Service and Support Portal User Guide - Part 1: Administrator Functions

Contents

1 Background and overview of the Service and Support Portal

1.1 Purpose of the Guide

The My Aged Care Service and Support Portal User Guide – Part One (User Guide) outlines how Commonwealth-funded service providers (providers) set up and maintain the My Aged Care Service and Support Portal (Portal) for your organisation.

The User Guide is split into two parts as follows:

- Part One (this document) provides an overview of the Portal and describes the functions an Administrator can perform.
- Part Two provides an overview of the Portal and describes the functions that a Team Leader or Staff Member can perform.

This guide does not cover:

- Detailed instructions on how to set up organisations in the Relationship Authorisation Manager, which can be found on the RAM website.
- Detailed instructions on how portal users obtain a myID (which can be found in the user guide Logging in to the Aged Care Systems.

! This symbol is used to highlight important information.

1.2 Introduction to using the Service and Support Portal

The Service and Support Portal is used to:

- Manage information about the services you provide.
- Manage referrals for service(s) issued by My Aged Care contact centre staff or aged care needs assessors (assessors) by accepting, rejecting, or placing on a waitlist.
- Update client records with information about services being delivered.
- Request that an assessor undertakes a Support Plan Review for a client.
- Report Serious Incident Response Scheme (SIRS) Priority 1 and Priority 2 incidents in residential, in-home, and Support at Home aged care services.
- Generate reports.
- Manage residential client classifications, reassessments, reconsiderations, and palliative care administration.
- Administering existing Diverse Needs Specialisations under the 2022 Framework.

1.3 Service and Support Portal Access

To access the Service and Support portal, each administrator must have a My Aged Care portal user account linked to a supported third-party authentication service. For more information regarding setting up users and logging into the system please refer to Logging in to the Aged Care Systems.

1.4 Staff roles in the Service and Support Portal

The person nominated as the Organisation Administrator needs to be the first person from your organisation to log in to the Portal. Refer to Logging in to the Aged Care Systems for more information.

The Organisation Administrator will be responsible for assigning roles to other staff; this can include assigning other staff the administrator role to help set up and maintain information about your organisation in the Portal. Roles should be assigned in accordance with the duties the person performs within your organisation.

! If you are assigned more than one role, this access will apply across all outlets you have been granted access to in the Service and Support Portal.

The tables on the following page outline the functions for each role within the Portal. It includes both client-focussed and organisation-focussed tasks.

Client Focussed Key Functions	Organisation Administrator	Outlet Administrator	Team Leader	Staff Member
Search for a client record (for referred clients)			✓	✓
View client records (for referred clients)			✓	✓
View referrals			✓	✓
Accept, reject, and revoke referrals			✓	
View tasks and notifications	✓	✓	✓	✓
Manage organisation preferences for tasks and notifications	✓			
Manage outlet preferences for tasks and notifications	✓	✓		
View My Aged Care interactions	✓	✓	✓	✓
Add client service information			✓	✓
Transfer clients between services	✓			
Submit notifications under the Serious Incident Response Scheme	✓	✓	✓	✓

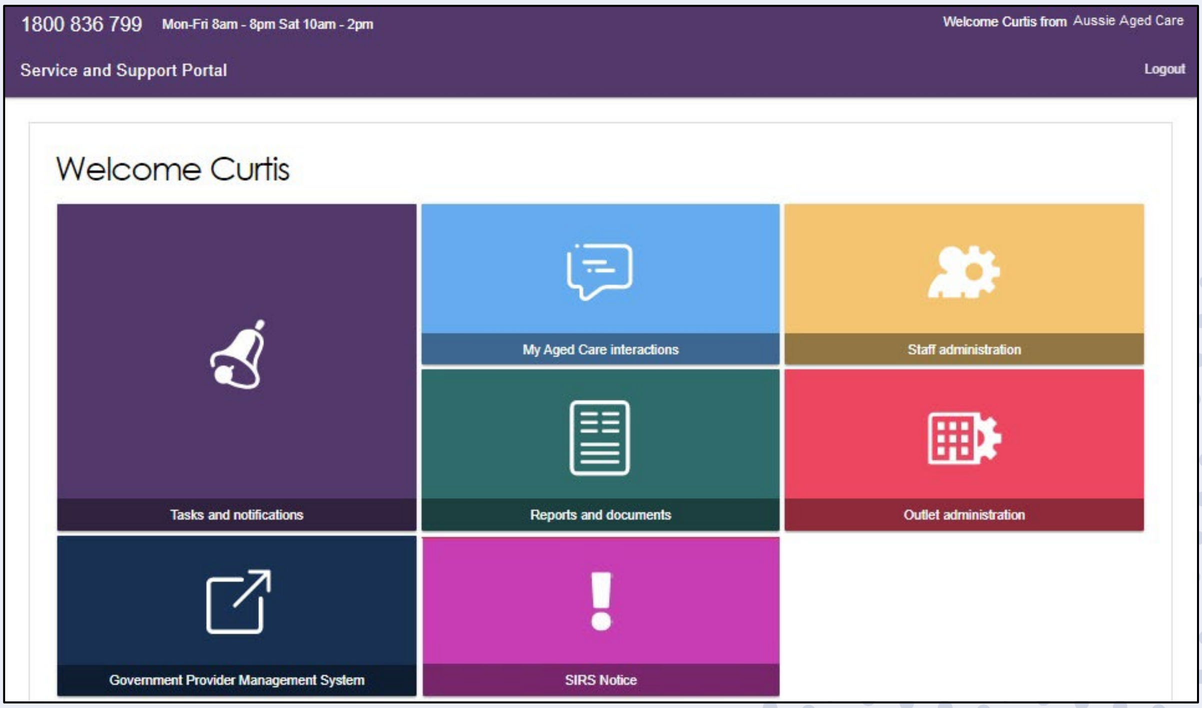
Organisation Focussed Key Functions	Organisation Administrator	Outlet Administrator
Request change to contractual information	✓	✓
Add outlets	✓	
Manage outlets: edit, activate, deactivate, remove	✓	✓
Manage services: add, edit, activate, transfer (Organisation Administrators only) or deactivate	✓	✓
Manage staff (organisation level): add, edit, deactivate, remove	✓	
Manage staff (outlet level): add, edit, deactivate, remove	✓	✓

1.4.1 Homepage views by role type

1.4.1.1 Administrator homepage

Administrators at an Organisation level can view and manage information for the entire organisation in the Service and Support Portal. Administrators for one or more outlet(s) in the organisation (Outlet level) will only be able to view and manage information for the outlet(s) they have been assigned.

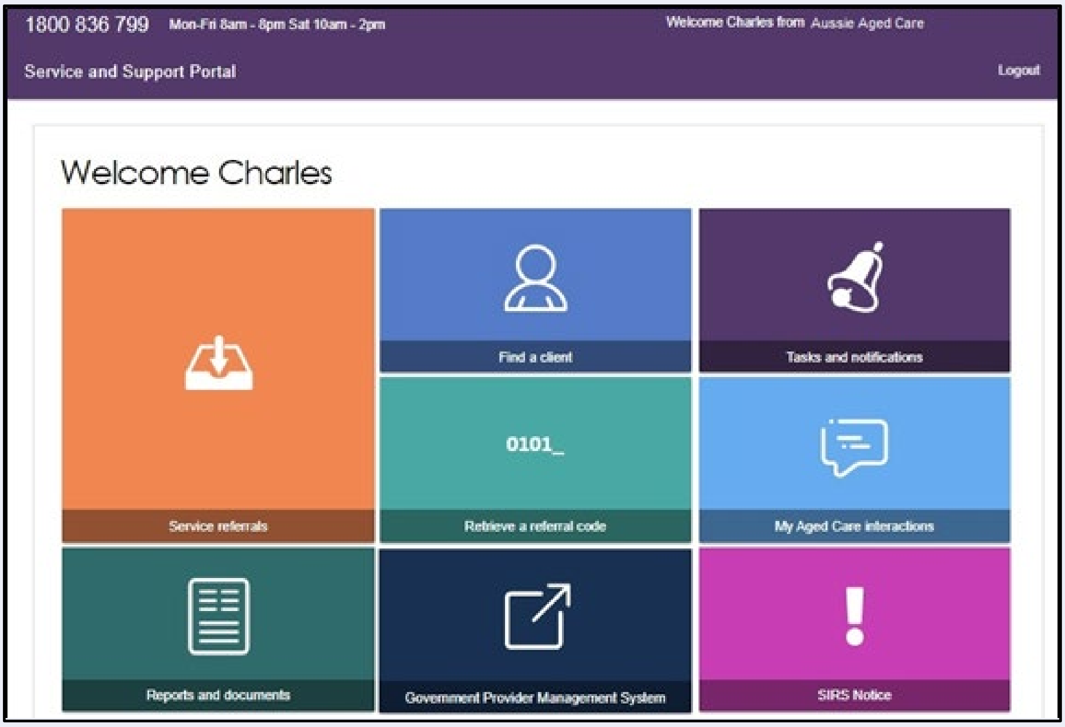
If you log in to the Service and Support Portal as an Administrator, you can view **Tasks and notifications**, **My Aged Care interactions**, **Reports and Documents**, **Outlet administration**, **SIRS Notice**, **Government Provider Management System** and **Staff administration** tiles on your homepage.



1.4.1.2 Team Leader homepage

People assigned the Team Leader role in the Service and Support Portal have the same functions as the Staff Member role but are also responsible for managing referrals for service(s).

If you log in to the Service and Support Portal as a Team Leader, you can view **Service referrals**, **Find a client**, **Tasks and notifications**, **My Aged Care interactions**, **Reports and Documents**, **Retrieve a referral code**, **SIRS Notice**, and **Government Provider Management System** tiles on your homepage.



If you do not have access to the SIRS notice tile, your Administrator for Service and Support Portal can add the **SIRS** role to your staff profile.

For information on how to add the serious incident report tile for staff members please refer to the guide on *How to use the Serious Incident Response Scheme Portal*.

1.4.1.3 Staff Member homepage

People assigned the Staff Member role in the Service and Support Portal are responsible for adding and updating client service information in the client record.

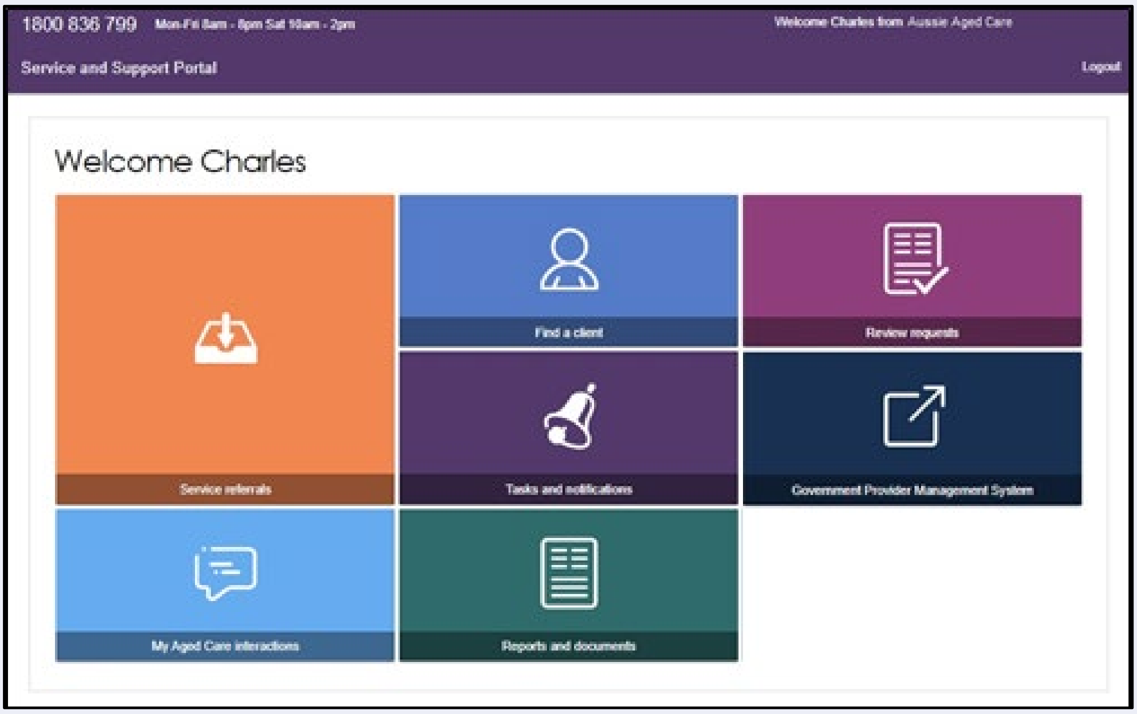
If you log in to the Service and Support Portal as a Staff Member, you can view **Service referrals**, **Find a client**, **Review requests**, **Tasks and notifications**, **My Aged Care interactions**, **Government Provider Management System** and **Reports and documents**.

If you do not have access to the SIRS Notice tile, your Administrator for the Portal can add the **SIRS** role to your staff profile.

For information on how to add the SIRS Notice tile for staff members please refer to the guide on:

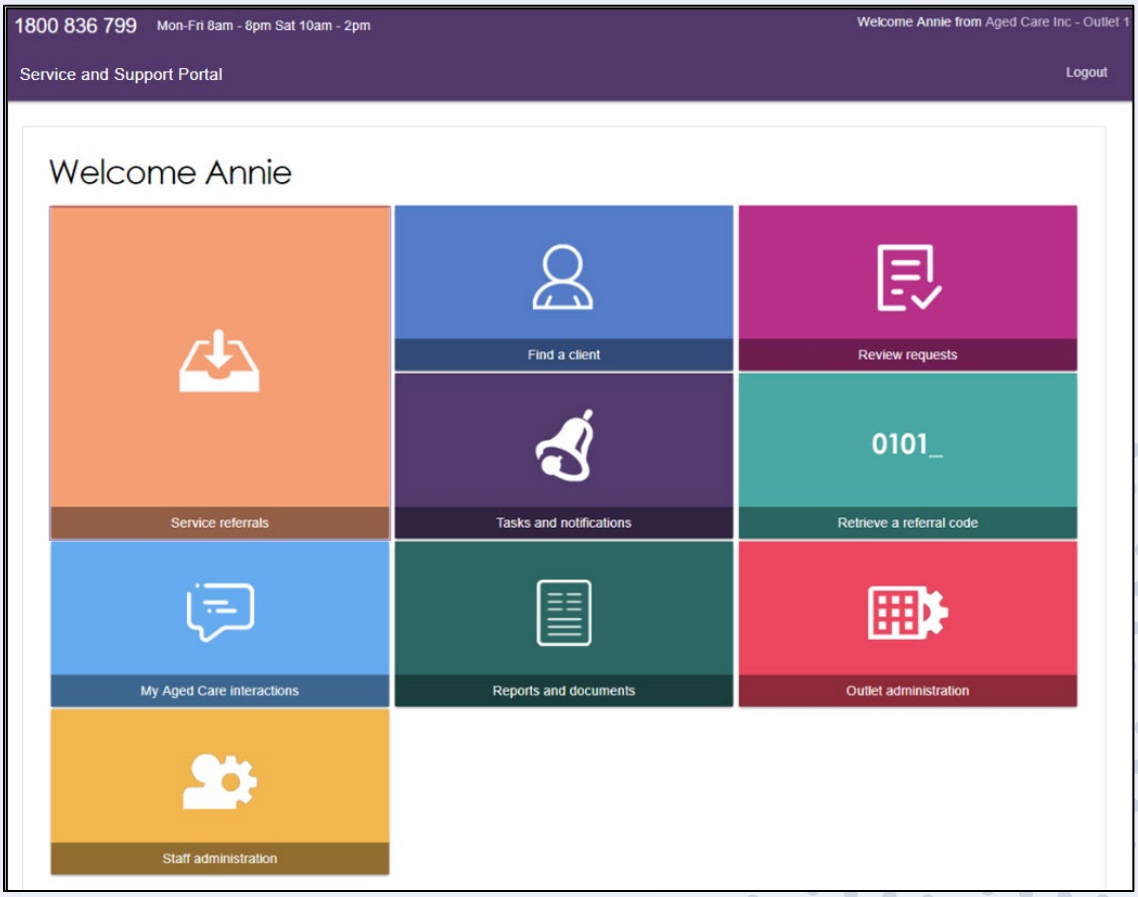
- How to access and use the Service and Support Portal for Serious Incident Response Scheme – Residential Aged Care services

If you have been assigned the **SIRS** role by your Organisation Administrator, you will have access to a **SIRS Notice** tile.



1.4.1.4 Homepage for users assigned multiple roles

If you log in to the Service and Support Portal as a user with Administrator, Team Leader, and/or Staff Member roles, you can view the functions for all your roles on the homepage.



2 The Administrator Role

Service information is publicly displayed in the My Aged Care service finder (service finder) on the My Aged Care website.

My Aged Care contact centre staff and assessors use this service information to send referrals. Potential My Aged Care recipients and their support network use this service information to research and access services.

It is the Administrator's responsibility to set up and maintain this information to ensure accurate referrals.

2.1 Creating service delivery outlets

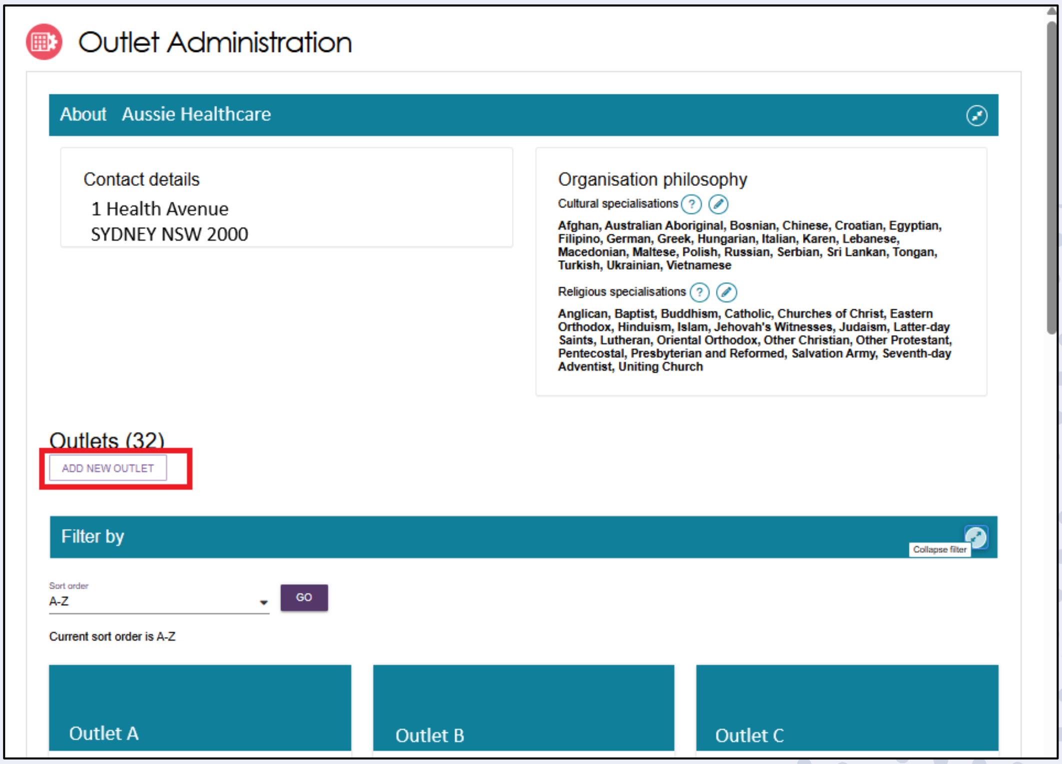
Administrators will need to set up at least one outlet in the Service and Support Portal before they can add their organisation's service information such as service items. Administrators can choose how to set up service(s) in the Portal: either all under one outlet or under multiple outlets.

Each outlet you set up can have different staff, service information, locations, and contact details recorded. Ideally, outlets should be established based on distinct delivery areas to manage client intake effectively and avoid overlapping delivery areas between outlets to prevent confusion and duplication of services .Refer to the user guide on Create service delivery outlets and add service information for further information about outlets.

2.1.1 Creating or adding a new outlet

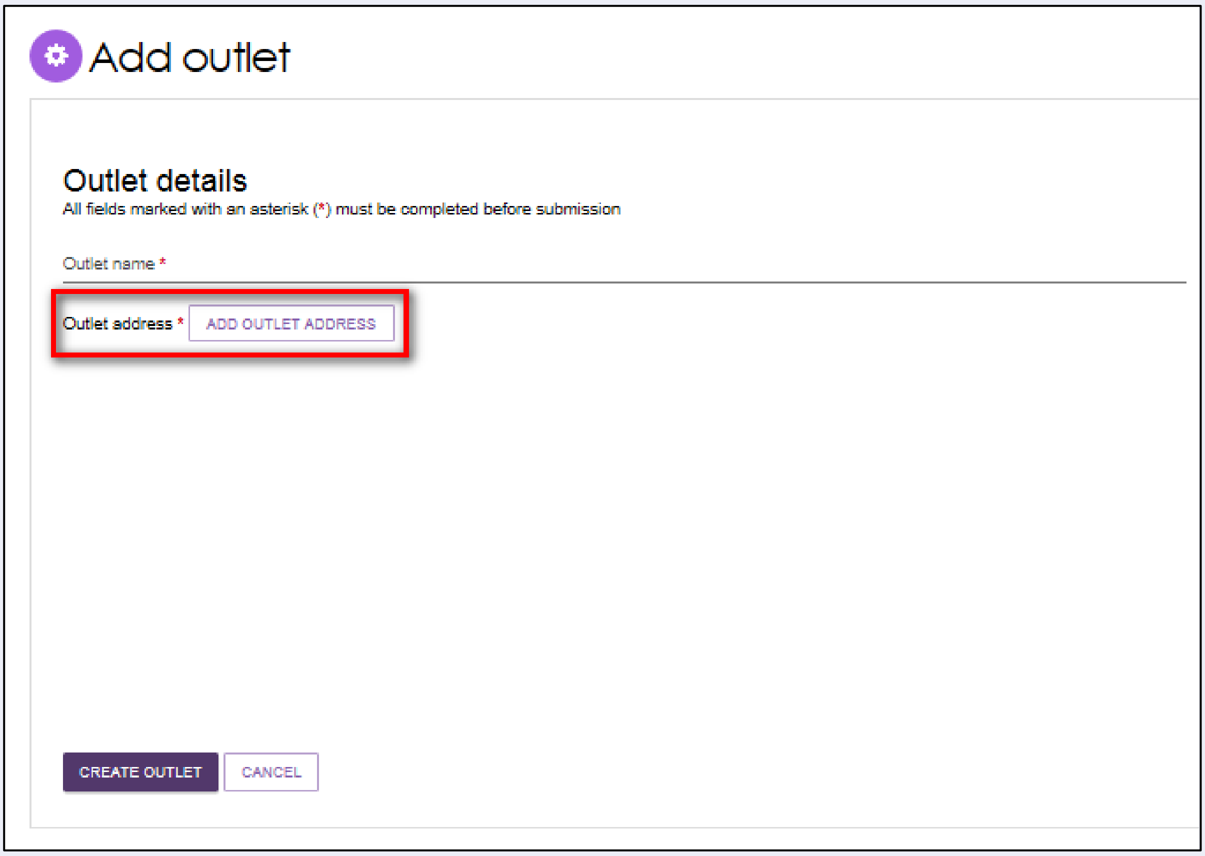
Administrators need to set up outlets in the Portal before service information can be added. When you create an outlet, the status is set to **Inactive** by default. You must activate the outlet and create service items in an outlet before it can be made operational.

1. From the Outlet administration page, select **ADD NEW OUTLET**.

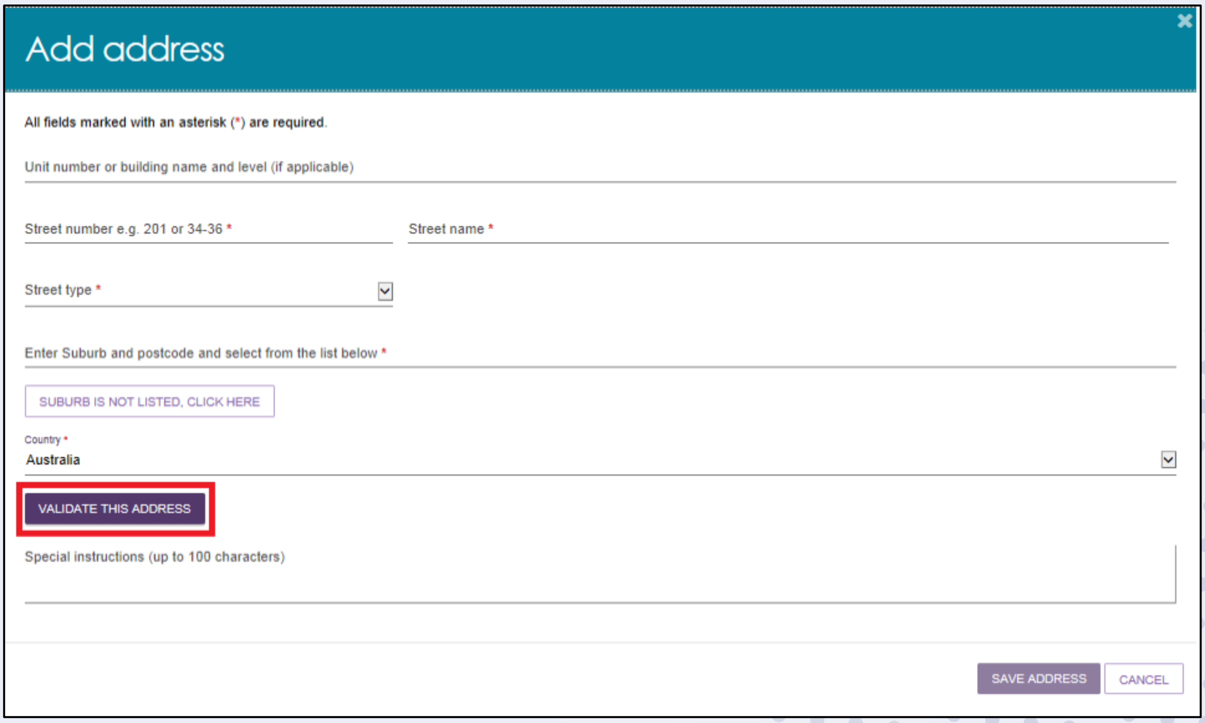


2. Enter outlet details.

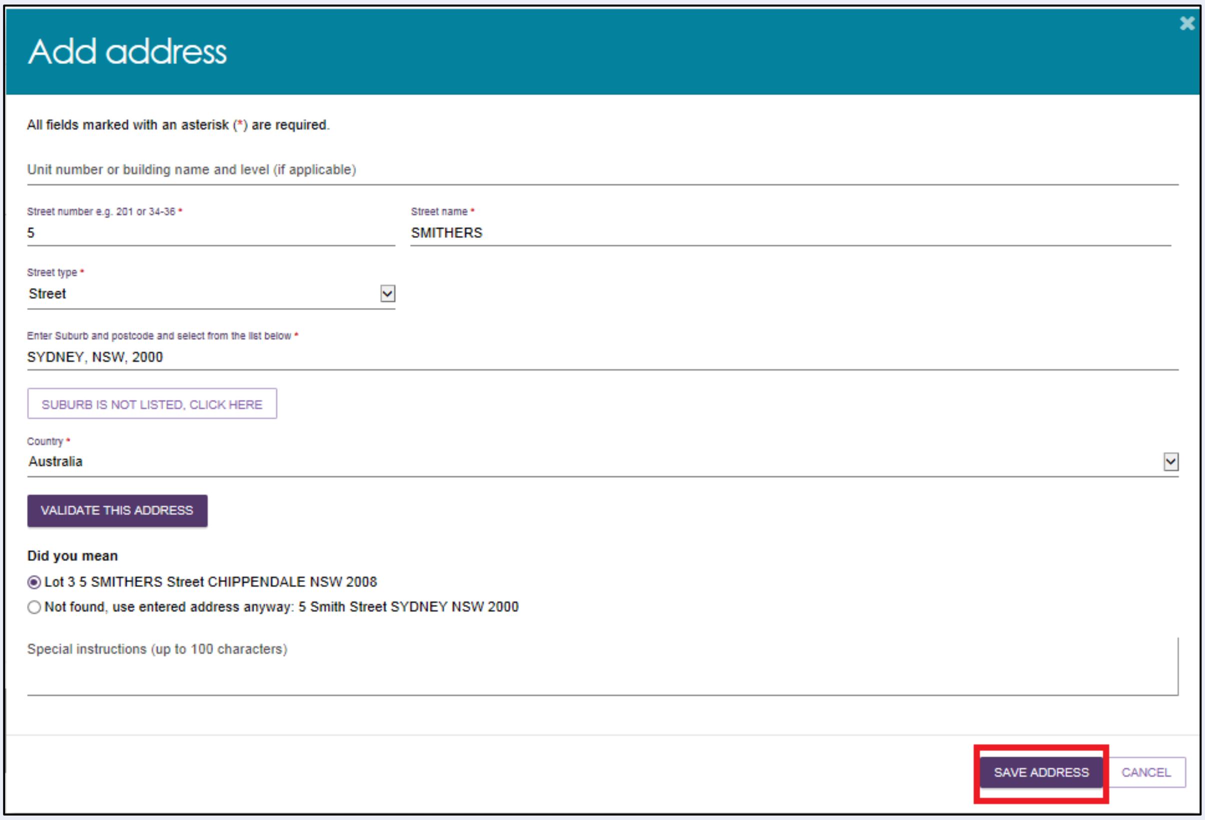
   To add an outlet address, select **ADD OUTLET ADDRESS**.



3. Fill out your address details, then select **VALIDATE THIS ADDRESS**.



4. Confirm that the address is displayed correctly, then select **SAVE ADDRESS**. If the address has been entered correctly but is not returned as a result, select **Not found use entered address anyway**.



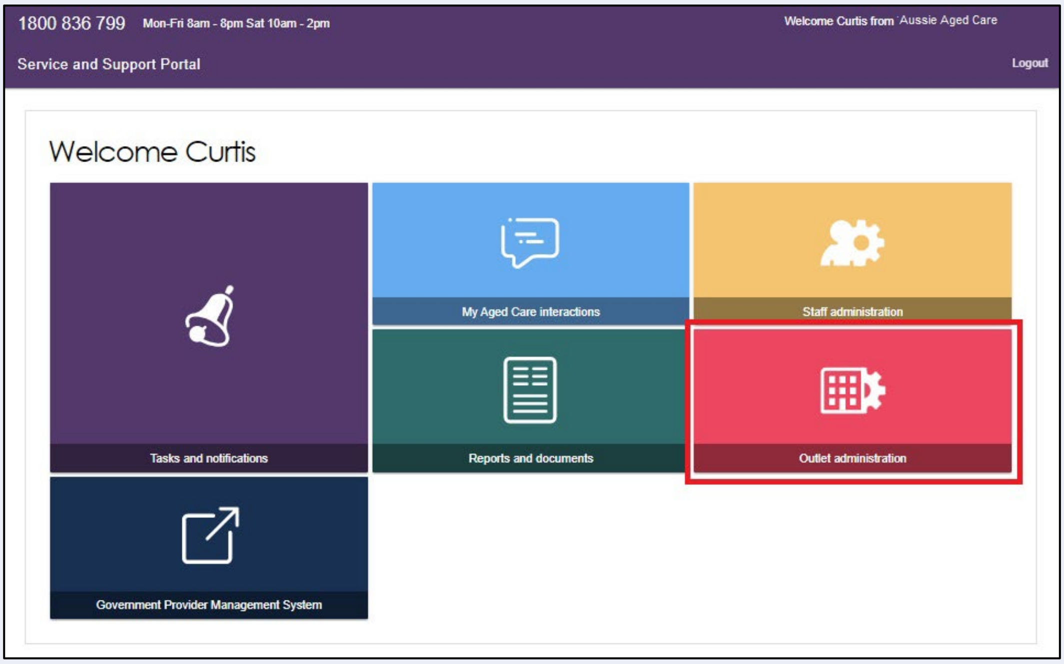
5. Complete the remaining fields. Select **CREATE OUTLET** to save the record and create the outlet.

The outlet has now been created and the details for the outlet have been saved. Repeat this process for remaining outlets, if required.

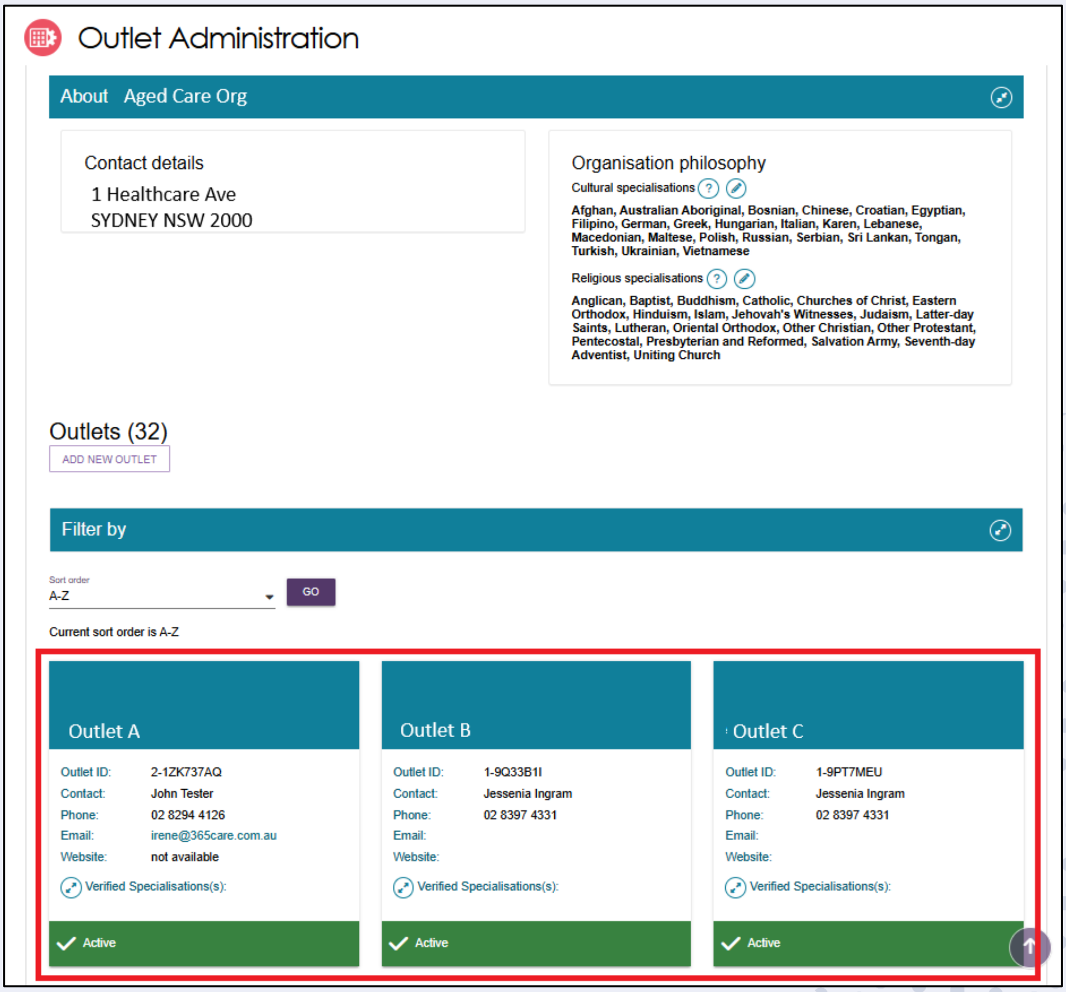
2.1.2 Viewing outlets

To view outlets, follow the procedure below.

1. Select **Outlet administration** from the homepage.



2. From here, you can view all of the outlets for your organisation.

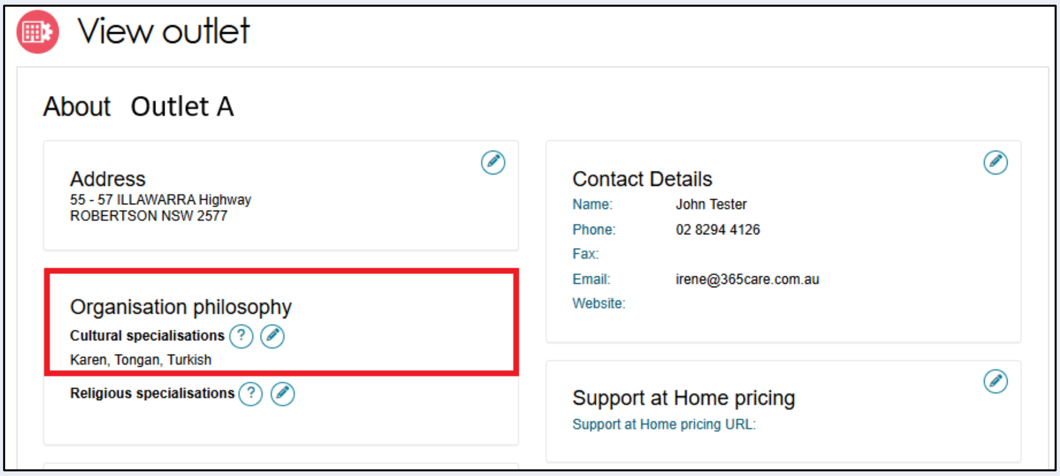


2.1.3 Editing the Organisation philosophy

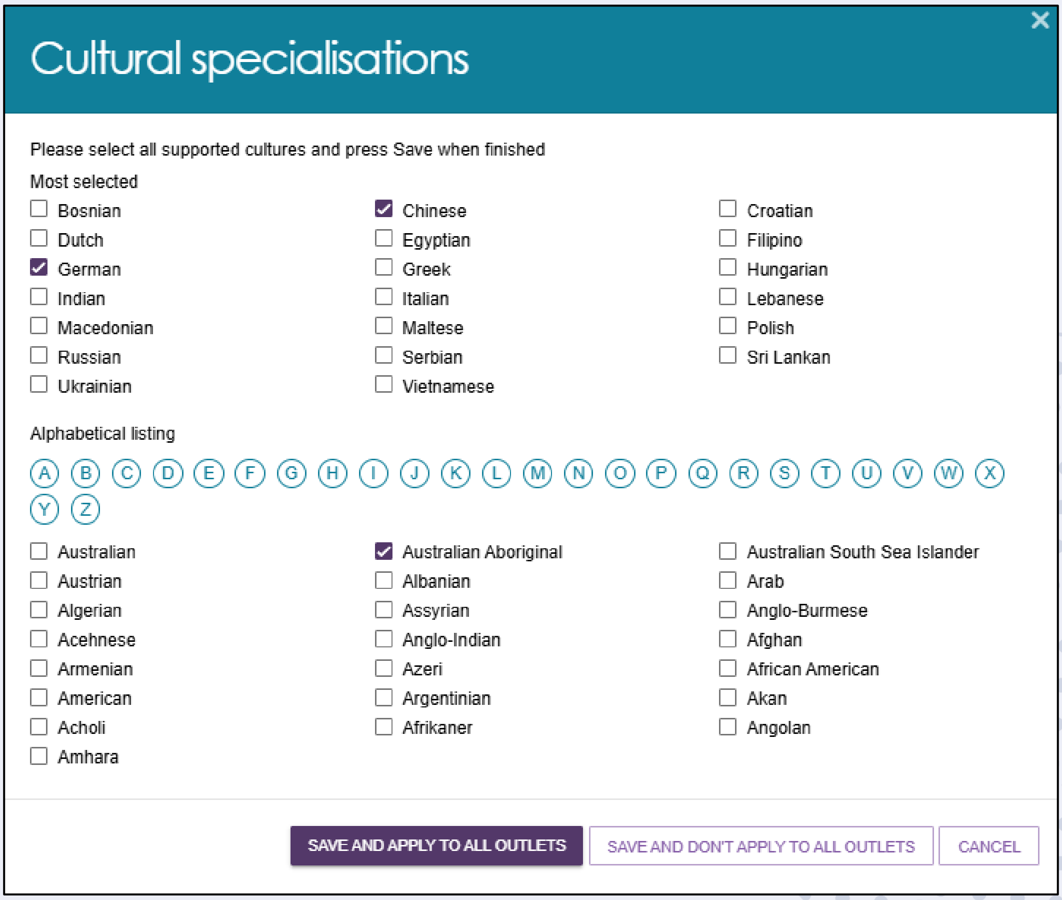
Organisation philosophy attributes and other specialisations will be shown in the service finder results and displayed as part of the detailed information for each of your services. These attributes and specialisations are not verified by the Department.

1. Add/edit cultural specialisations.

In the View Outlet page, select the **Edit** icon next to Cultural specialisations to select those groups that you have a focus on providing culturally specific care to.

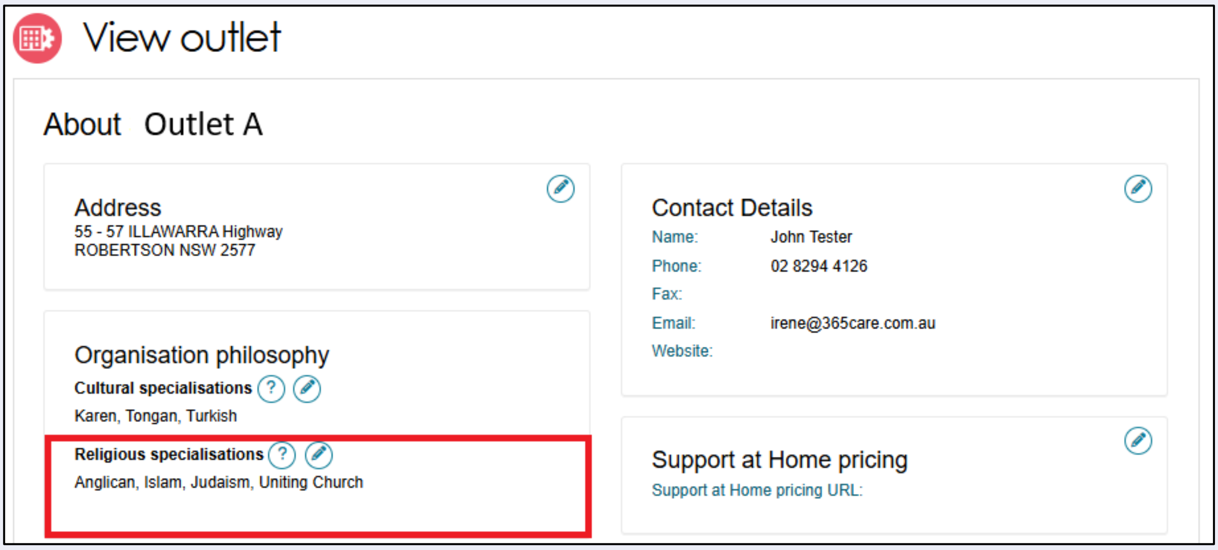


You can choose to apply this to all services in your organisation by using the **SAVE AND APPLY TO ALL OUTLETS** option or save as a default for all new services added by using the **SAVE AND DON'T APPLY TO ALL OUTLETS** option.

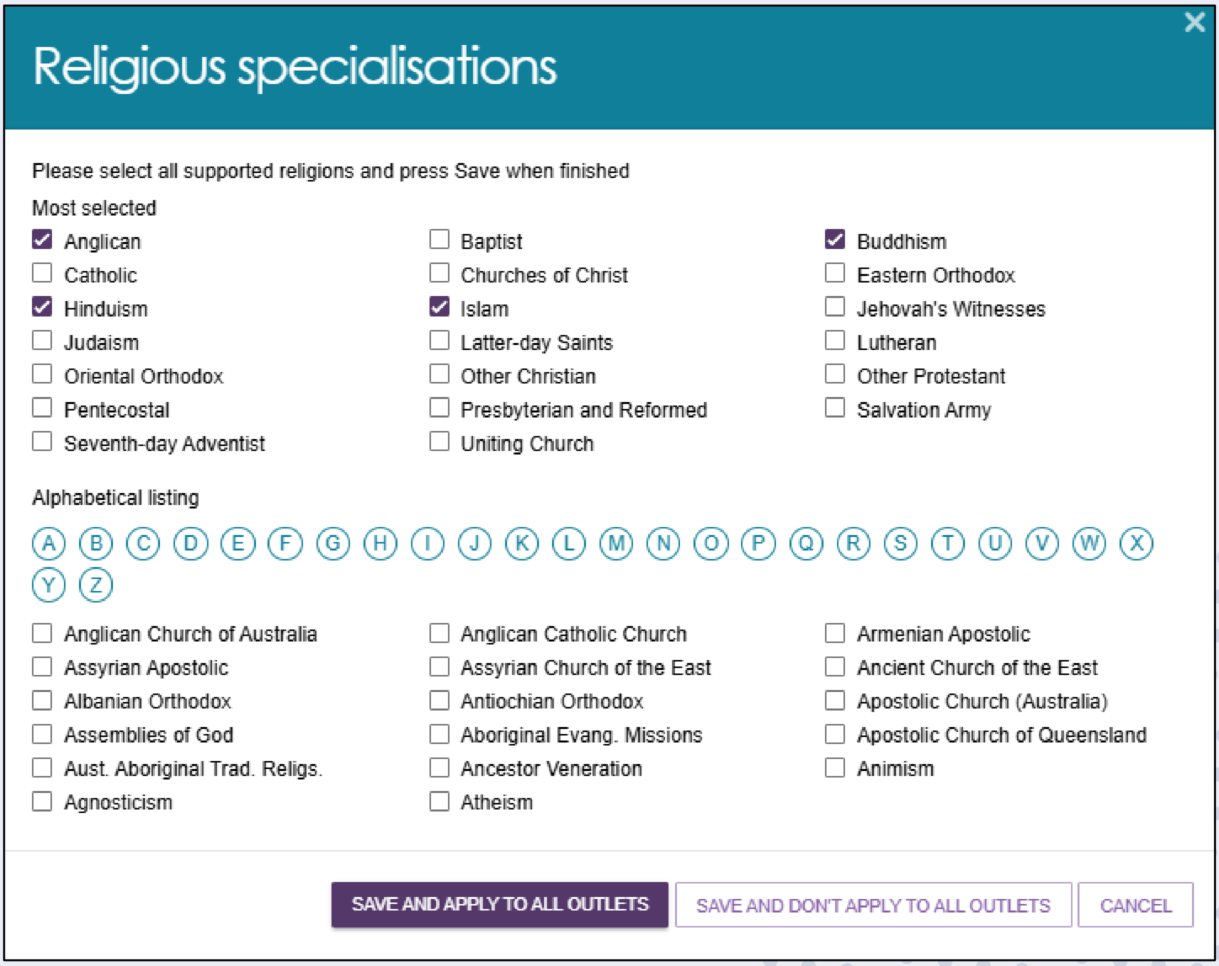


2. Add/edit religious specialisations.

Select the **edit** icon next to **Religious specialisations** to indicate if you have a focus on delivering care that aligns with particular religious needs or values.



You can choose to apply this to all current services in your organisation by using the **SAVE AND APPLY TO ALL OUTLETS** option or save as a default for all new services added by using the **SAVE AND DON'T APPLY TO ALL OUTLETS** option.



2.1.4 Diverse Needs Specialisations

All aged care services must provide care in which each consumer is treated with dignity and respect, with their identity, culture and diversity valued. While all service providers are required to deliver these inclusive care services, there are some that deliver specialised care for particular groups. Outlets with specific knowledge, expertise, and services, can apply to have their diverse needs specialisation verified. This helps older Australians with diverse aged care needs choose the care that best suits them.

Specialisations relating to a person's community or background are verified under the My Aged Care Provider Specialisation Verification initiative. These specialisations are:

- Aboriginal and Torres Strait Islander peoples and communities
- people from culturally and linguistically diverse backgrounds
- people who are financially or socially disadvantaged
- veterans
- people who are homeless or at risk of becoming homeless
- care leavers
- parents separated from their children by forced adoption or removal
- lesbian, gay, bisexual, transgender, and intersex people
- people who live in rural or remote areas.

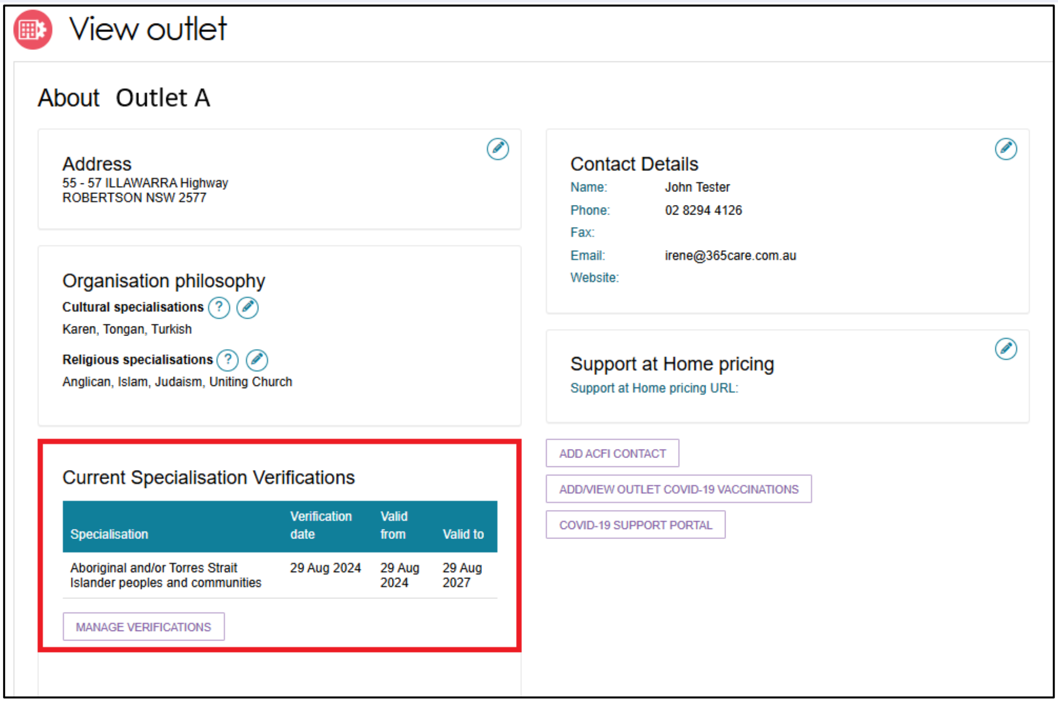
Providers who wish to make claims that their outlet specialises in the care of people identifying with one or more of the Diverse Needs groups will need to apply to have these claims verified by a third-party assessor. While all providers must demonstrate that they meet the Aged Care Quality Standards, providing specialised services for the Diverse Needs groups is an optional and additional step.

Successful verification depends on the outlet's ability to demonstrate they provide specialised care. The Specialisation Verification Framework sets out the criteria providers are required to meet, and expected forms of evidence.

Verified specialisations will be published on the My Aged Care Provider profile. Providers who have not had their specialisation claim(s) verified will have those claims removed.

For more general information on the verification process, please refer to the Specialisation Verification for Aged Care Services website.

> **!** Providers can only view and manage specialisations that were verified under the 2022 Specialisation Verification Framework in the Service and Support Portal.
>
> From 1 November 2025, new Specialisation Verification applications will be assessed under the 2025 Framework.
>
> Upon transferring a service to a new outlet, any diverse needs specialisations recorded against the service will be removed. The ability for outlet administrators to add/remove diverse needs specialisations against that service will be controlled by the current specialisation verifications in place at the new outlet.



2.2 Service Items

You will need to create and maintain information about the aged care services that your organisation provides (known as service items in the Service and Support Portal) in order to receive referrals through My Aged Care.

Service items in general include:

- Service sub-types, for non-Support at Home programs
- Services, for Support at Home
- Service types, which are groupings of Support at Home services
- Service groups, which are groupings of Support at Home service types.

It is important that information about the services you provide is kept up to date as the information is publicly displayed for prospective My Aged Care recipients and their support network on the service finder on the My Aged Care website (www.myagedcare.gov.au), and used by My Aged Care contact centre staff and assessors to refer clients to service(s).

! Under the Aged Care Act 2024, from 1 November 2025:

- New service items are available. Some services offered under the Aged Care Act 1997 are no longer available.
- Some services continue in a different form.
- For more information about these changes please refer to the Department's webpage on New Aged Care Act resources.

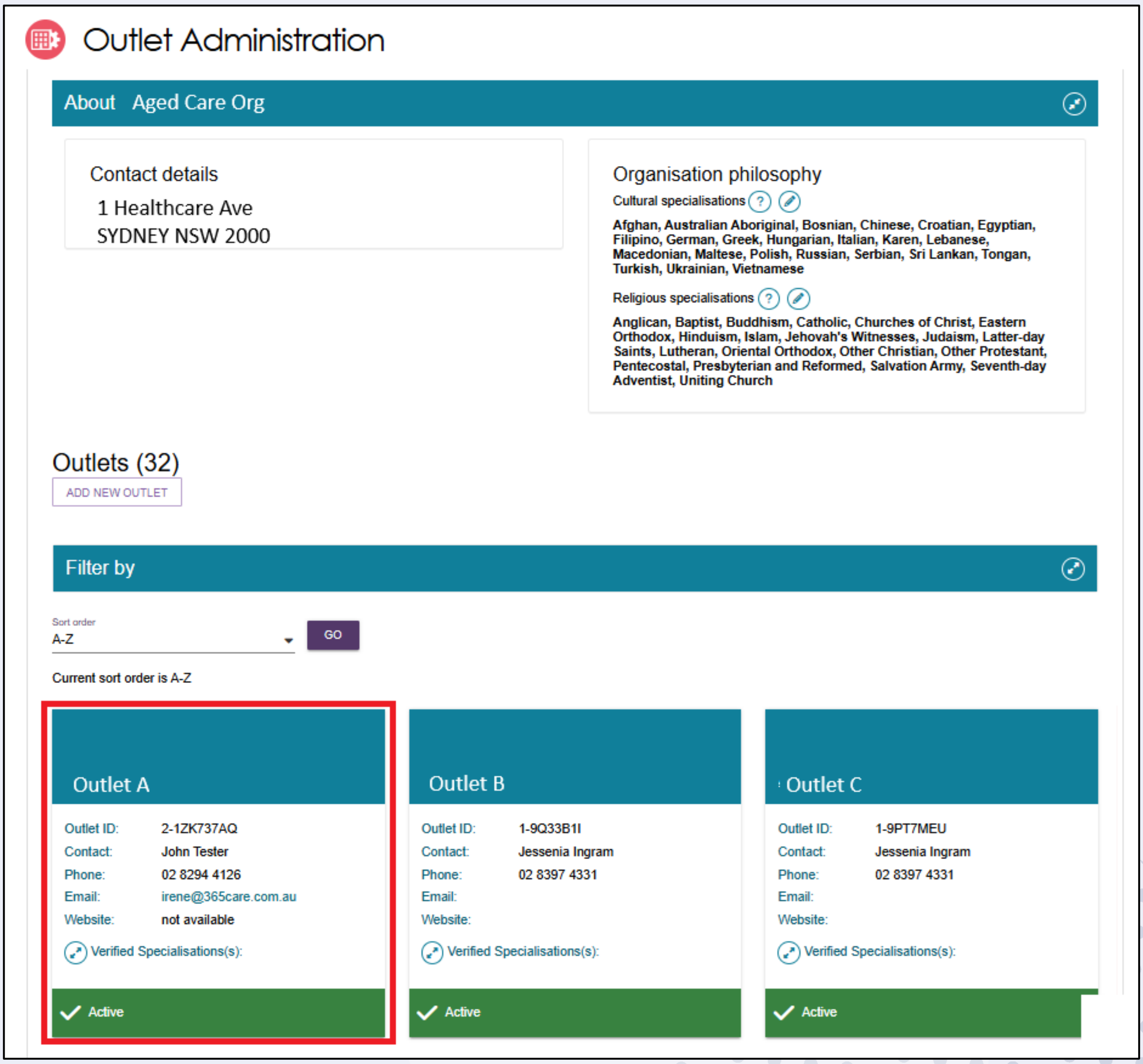
Services need to be linked to one or more of your outlets.

2.2.1 Adding a service item

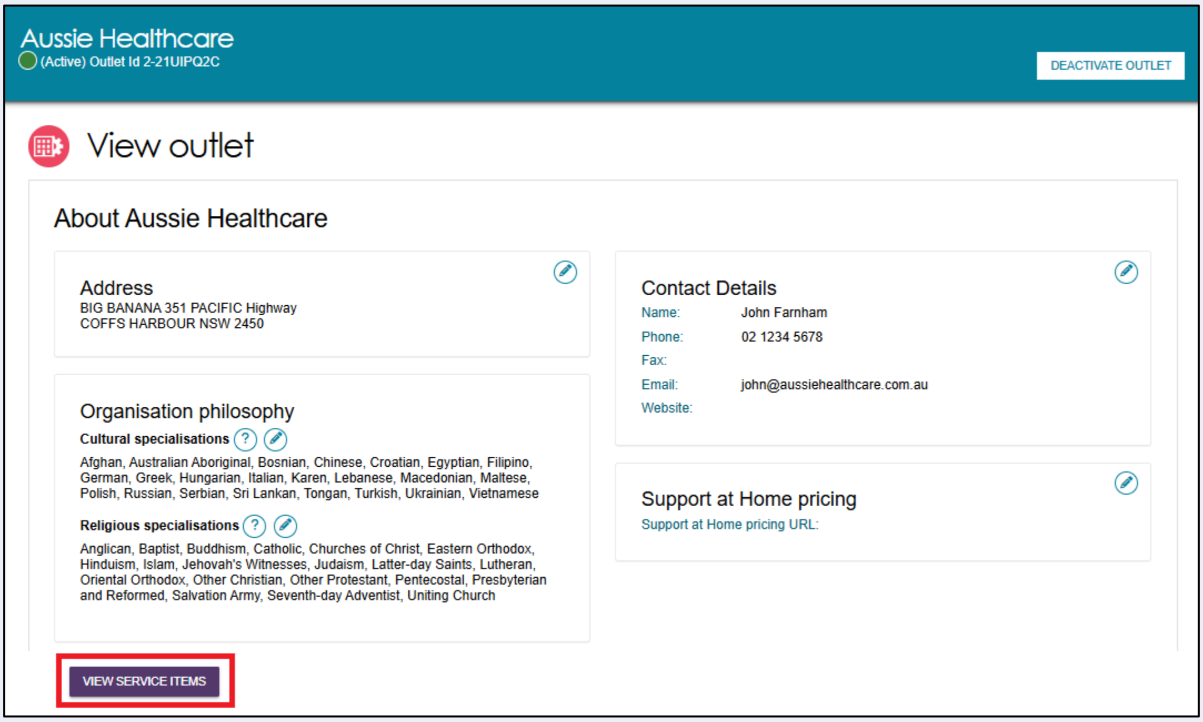
Follow these steps to add a service item:

! From 1 November 2025, there will be new and renamed services in all Aged Care Programs. Previous applications will have their selected services remain the same, with new applications showing the updated service list. For more information on the service names, refer to the [Aged care service list](#) website.

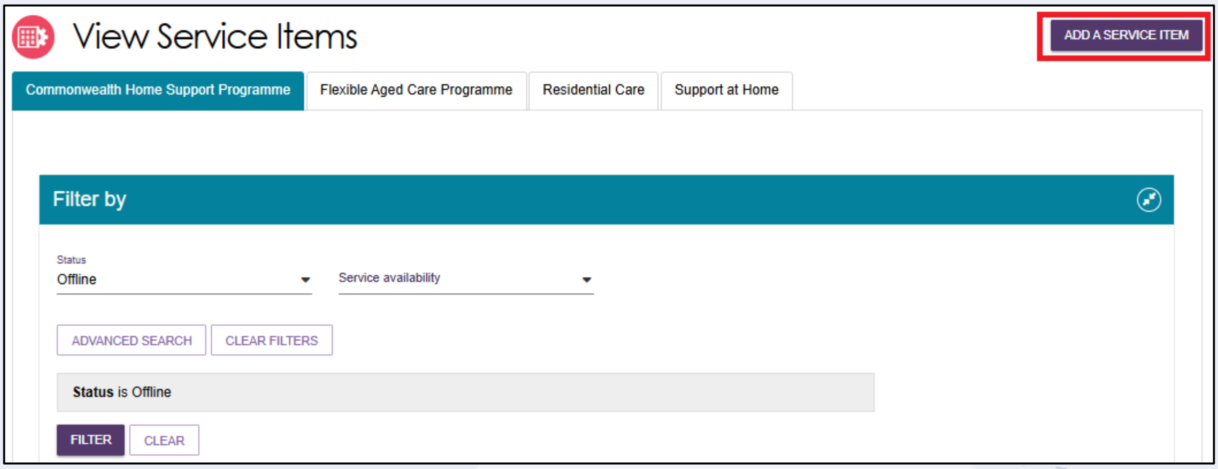
1. [From the Outlet administration page](#), select the name of the outlet on the outlet card that you want to add a service item to. The **View Outlet** page then appears.



2. From the **View outlet** page, select **VIEW SERVICE ITEMS**.

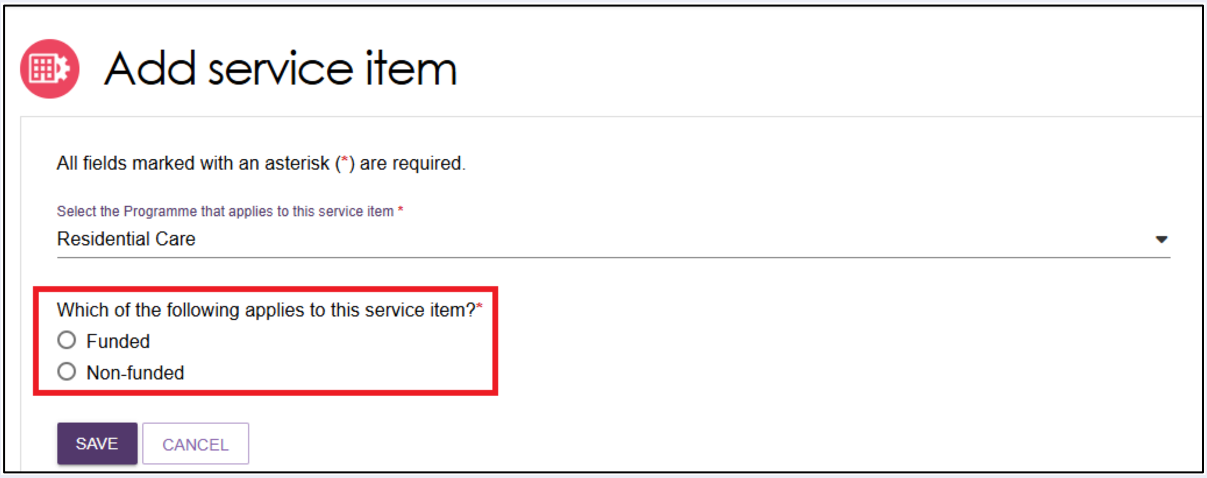


3. From the View Service Items page, select **ADD A SERVICE ITEM**.

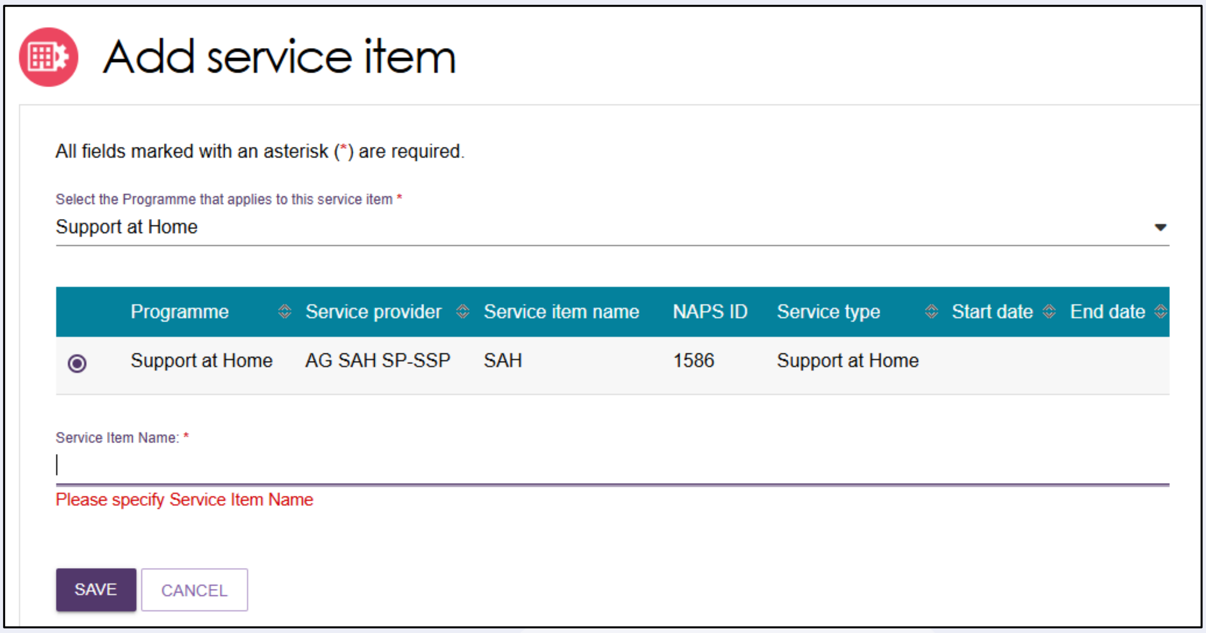


Select the program for the service that you wish to add.

If applicable, select **Funded or Non-funded** for the program that you are adding.

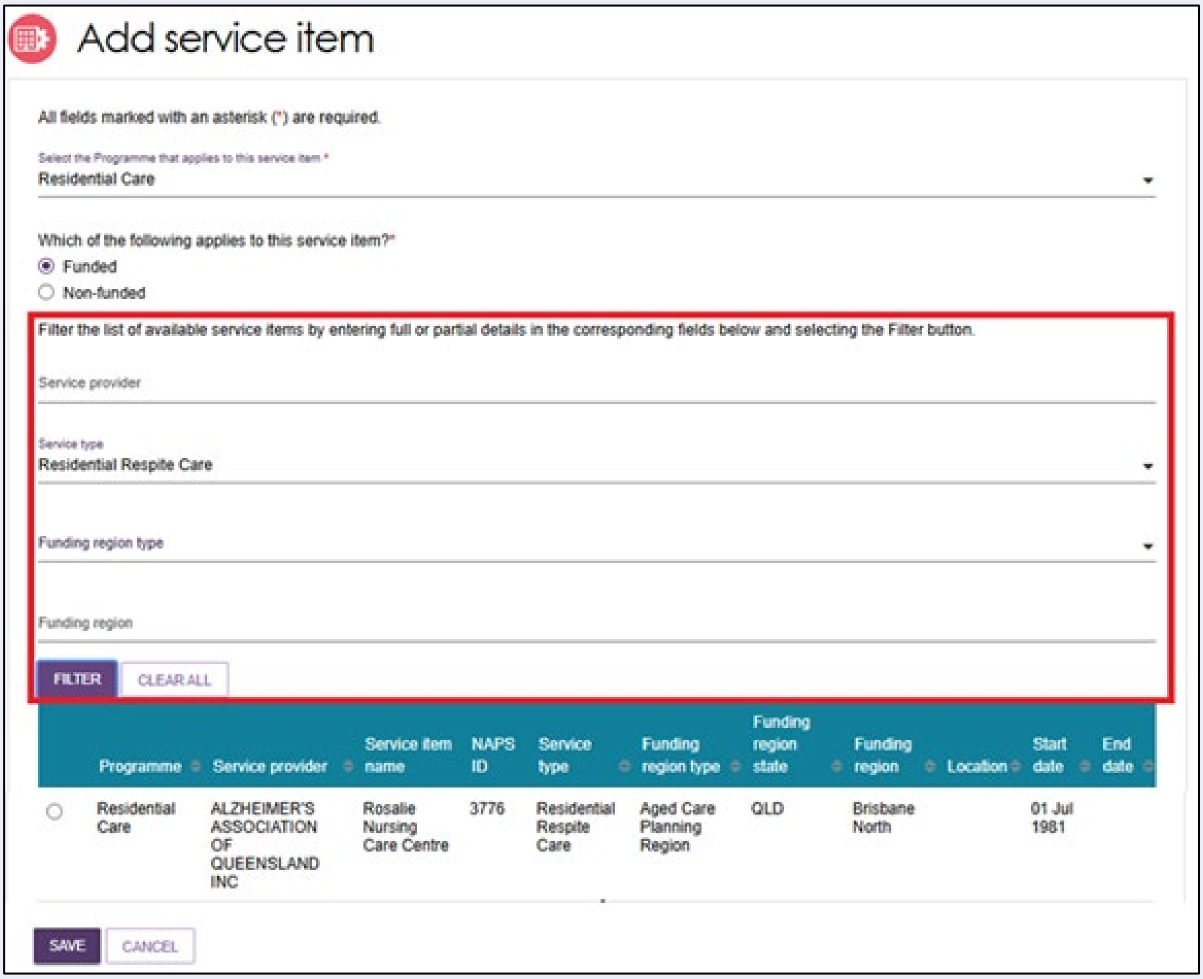


For Support at Home services this option will not be available as all services must be Commonwealth government subsidised. You will be asked to specify a unique service item name instead.

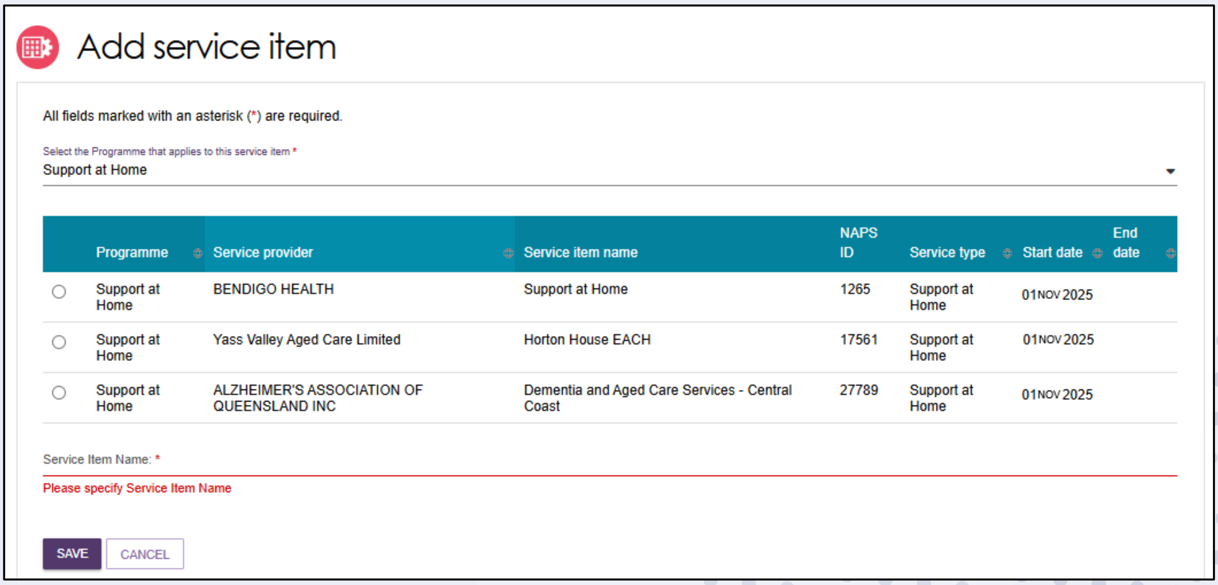


4. Add the service item/s under the program.

For funded services, select the service you want to add to your outlet by selecting the relevant service item and then select **SAVE**. You can refine the list of service items by entering details and using the **FILTER** function.



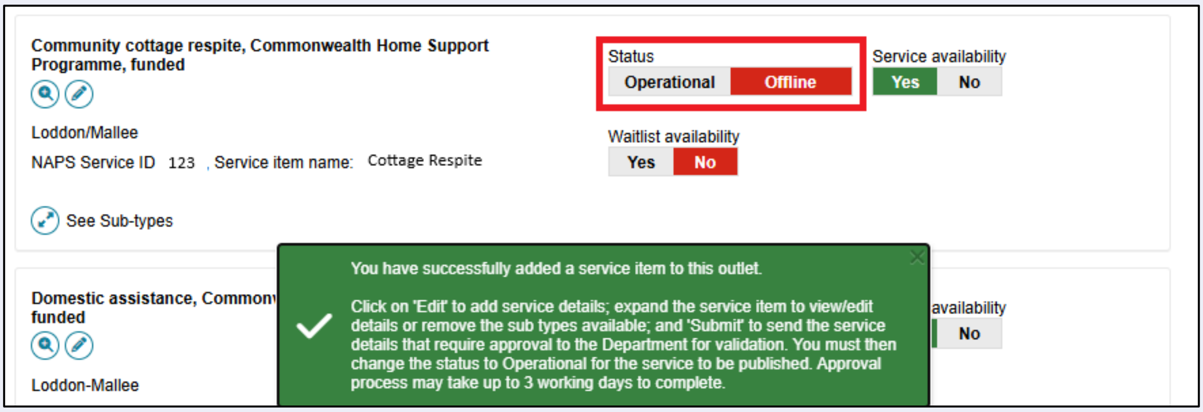
If you are adding a new Support at Home service, you will be required to enter a unique name for the service in the **Service Item Name** field that is displayed.



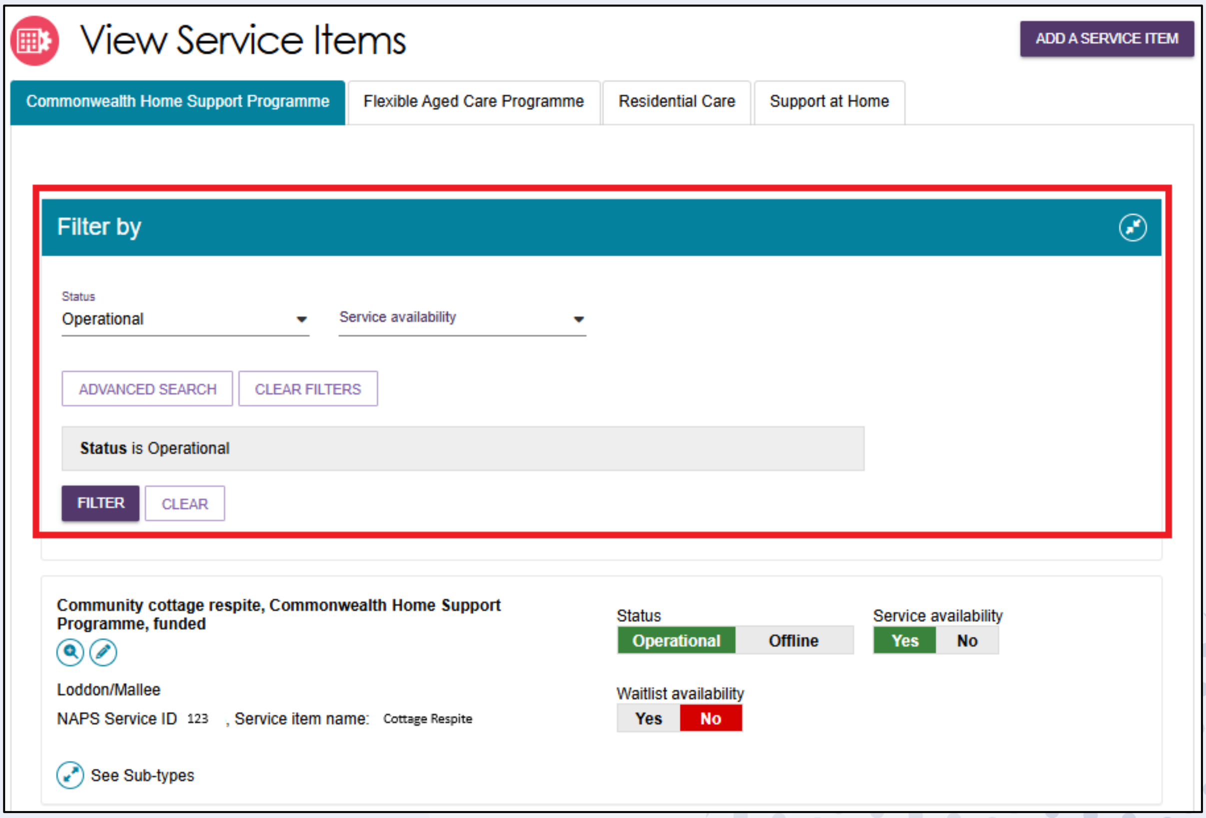
5. The service item will now display in the Outlet details page under **Services**.

The new service will be listed with a status of Offline. A banner will also indicate that you have successfully added a service item to the outlet, and to remind you to Edit and Submit.

The status will need to be changed to **Operational** before it is displayed on the public service finder. Refer to [Activating or deactivating a service item]() for more information.



6. Once service items have been added to an outlet, you can filter the list of services under a specific program by status, service availability and waitlist availability.



2.2.2 Editing a service item

You can edit service item details, including:

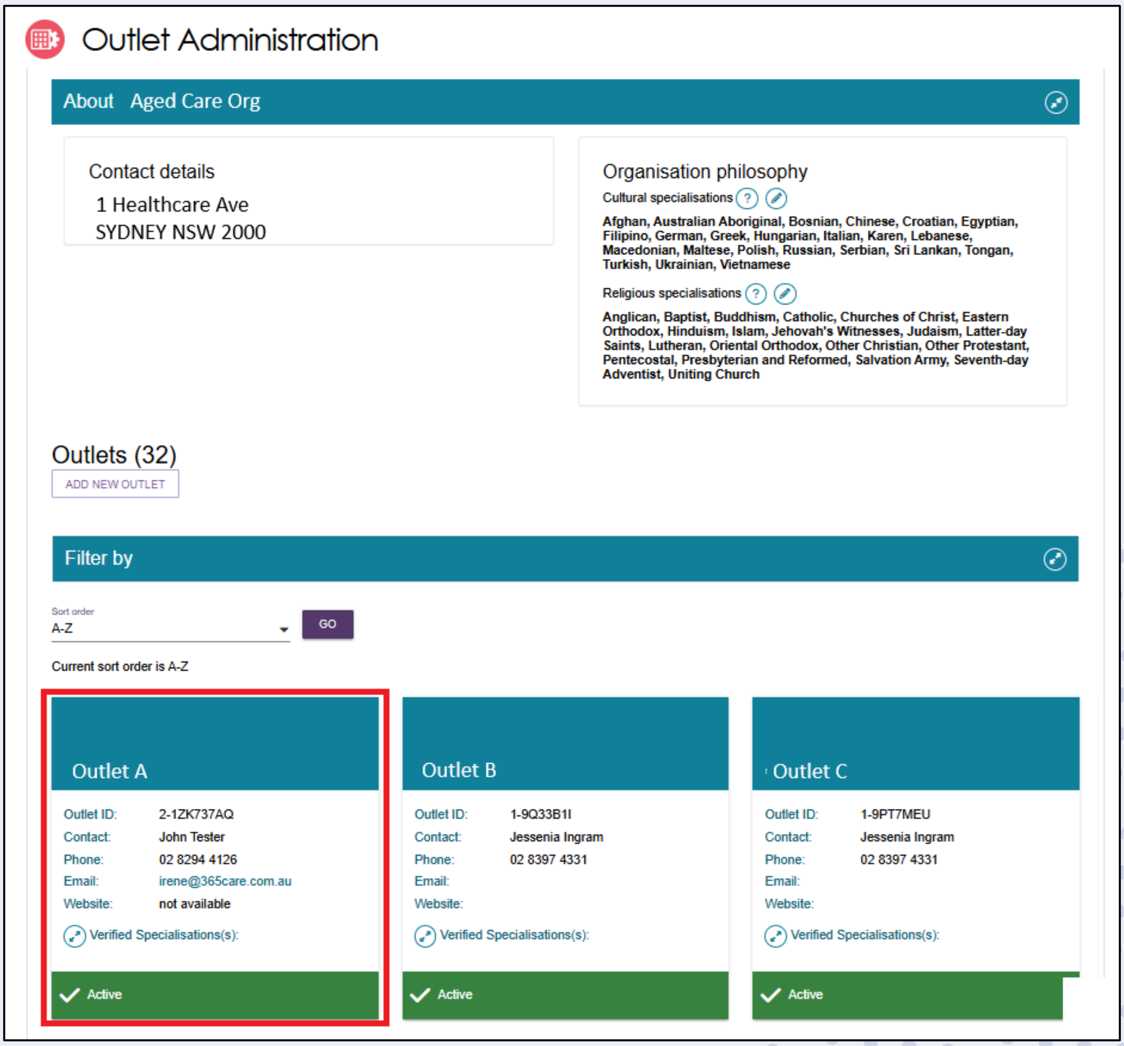
- Service item name
- Service delivery area
- Specialised services (refer to ***Editing the Organisation Philosophy***)
- Promotional attachments (for residential facilities)
- Support at Home-specific attributes e.g. service-based pricing.
- Detailed description for the service item.

Service information will be displayed on the Service Finder on the My Aged Care website. When you update this information, the changes will appear on the *Service Finder* by the next day.

Follow these steps to edit service information:

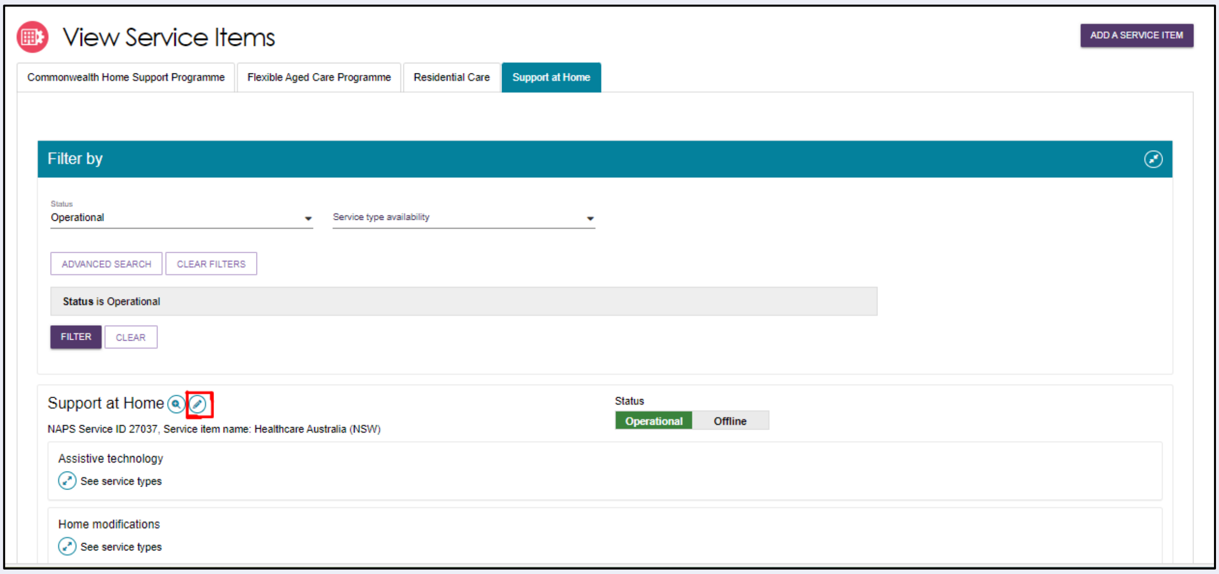
! Only non-contractual information can be edited in the Service and Support Portal.

1. From the Outlet administration page, select the name of the outlet on the outlet card that you want to add a service item to. The **View Outlet** page then appears.

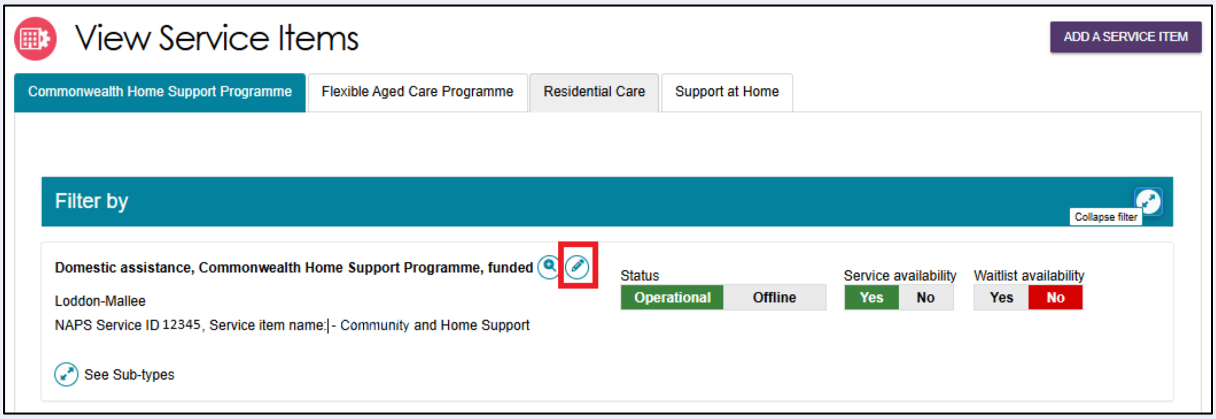


2. On the View outlet page, select **VIEW SERVICE ITEMS** then select the Edit (Pencil) icon next to the relevant service item, or next to the **Support at Home** heading.

SUPPORT AT HOME SERVICE ITEM EXAMPLE



NON-SUPPORT AT HOME SERVICE ITEM EXAMPLE



3. The **Service details** page will display.

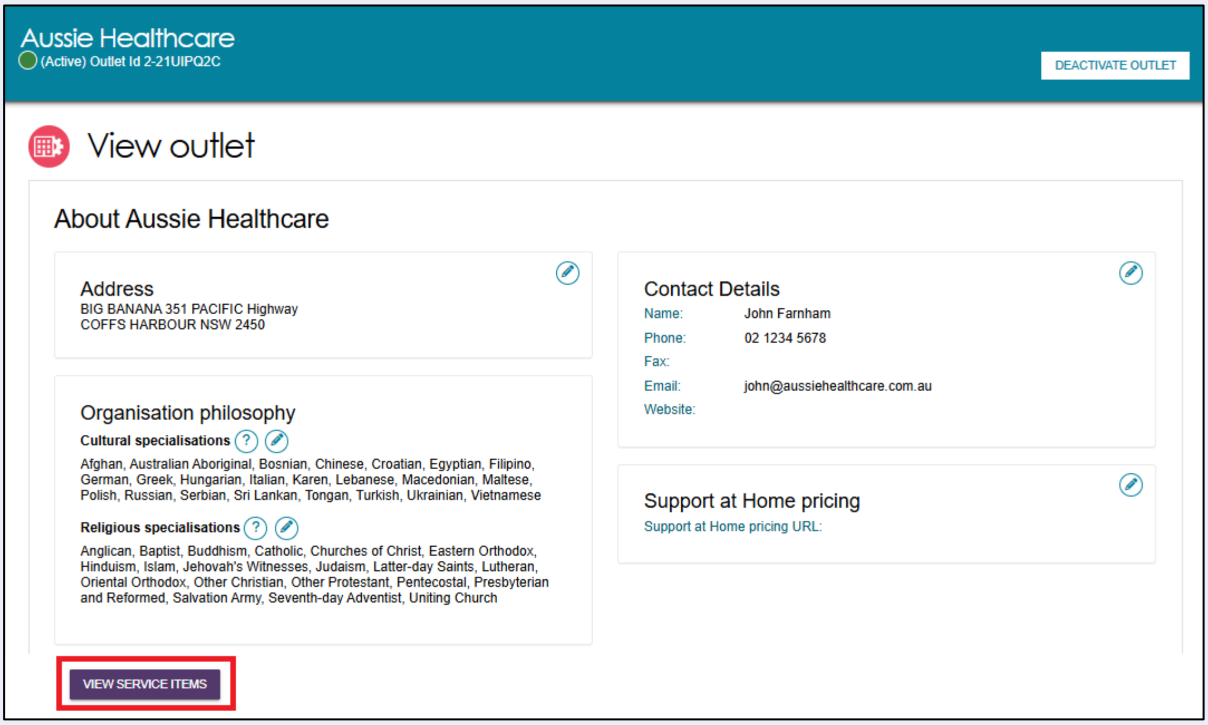
Make the required changes and select **SAVE**. Read-only information is contractual information and cannot be edited via the Service and Support Portal. Any additional service information can be added in the **Service description** free text field. This information will be displayed in the public service finder on the My Aged Care website to assist clients in selecting a provider.

> **!** There are different options presented on a Support at Home service details page and a CHSP (Commonwealth Home Support Program) service details page.
>
> Support at Home services are managed by delivery area. You can select multiple service types and items available within that area.
>
> CHSP providers will remain limited to a single service type and ACPR (Aged Care Planning Region), based on contractual information for each service item.

2.2.3 Editing availability and waitlists for a service

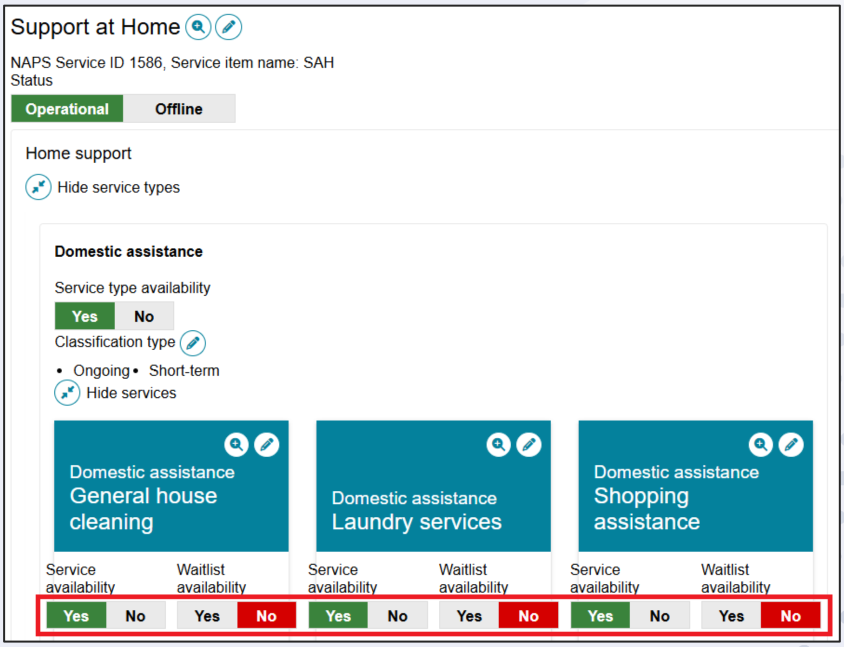
To indicate that a waitlist is offered for a service, you must ensure the waitlist availability status on the service item is set to **Yes** – to show that a waitlist is available, or **No** – to show that there is no waitlist.

1. From the Outlet administration page, select the name of the outlet on the outlet card that you want to add a service item to. Then from the View Outlet page, select **View Service Items.**

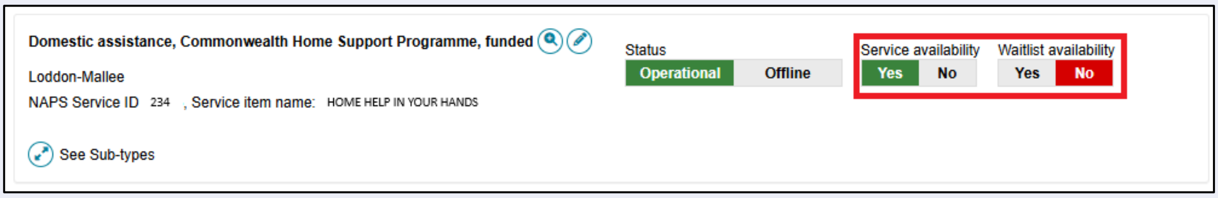


2. Select the relevant service/waitlist availability status (yes / no) by toggling the Yes | No switch. The location of the Yes | No switches will depend on the type of outlet and service chosen.

SUPPORT AT HOME EXAMPLE



NON-SUPPORT AT HOME EXAMPLE



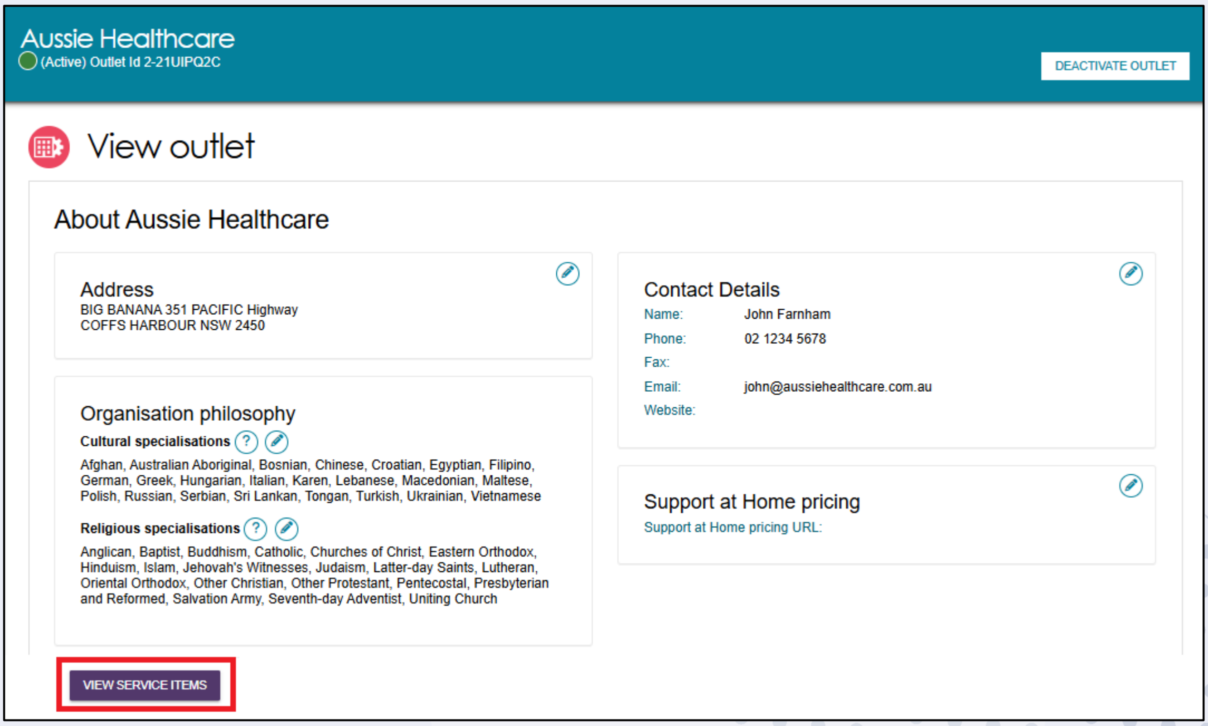
2.2.4 Editing service delivery area

Information about the areas you deliver Commonwealth-funded services in (referred to as service delivery areas in the Service and Support Portal) are pre-populated, based on your contractual information.

Service delivery areas can be edited for CHSP, Flexible Aged Care Program, and Residential Care service items. This functionality is not available for individual Home Support services. Changes apply to the entire Support at Home offering.

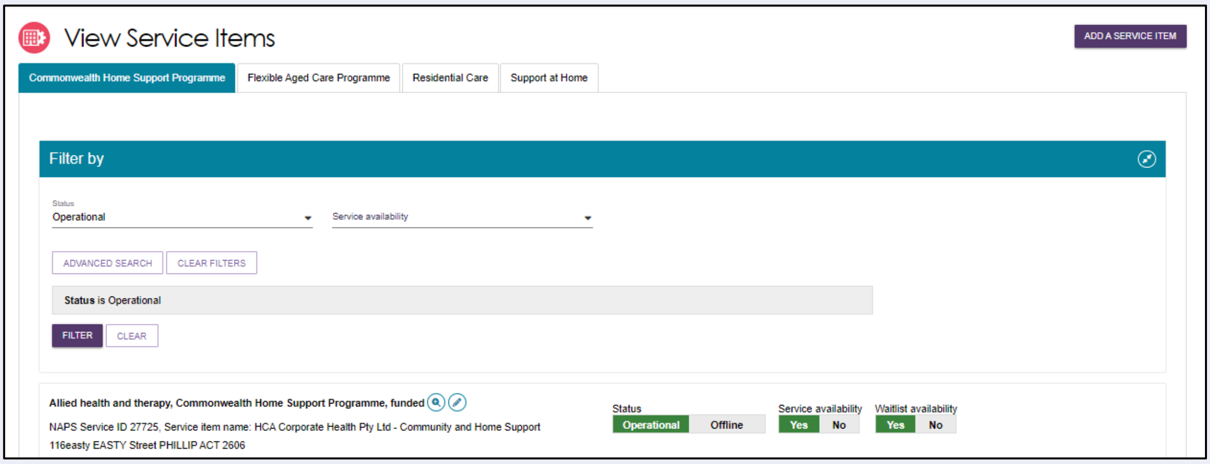
All providers (except residential care) must review their service delivery area information and edit if required. It is important that you ensure the service delivery area(s) is accurate. This information is publicly displayed in the service finders, and impacts the referrals sent by contact centre staff and assessors.

1. From the Outlet administration page, select the name of the outlet on the outlet card that you want to add a service item to. Then from the View Outlet page, select **View Service Items.**

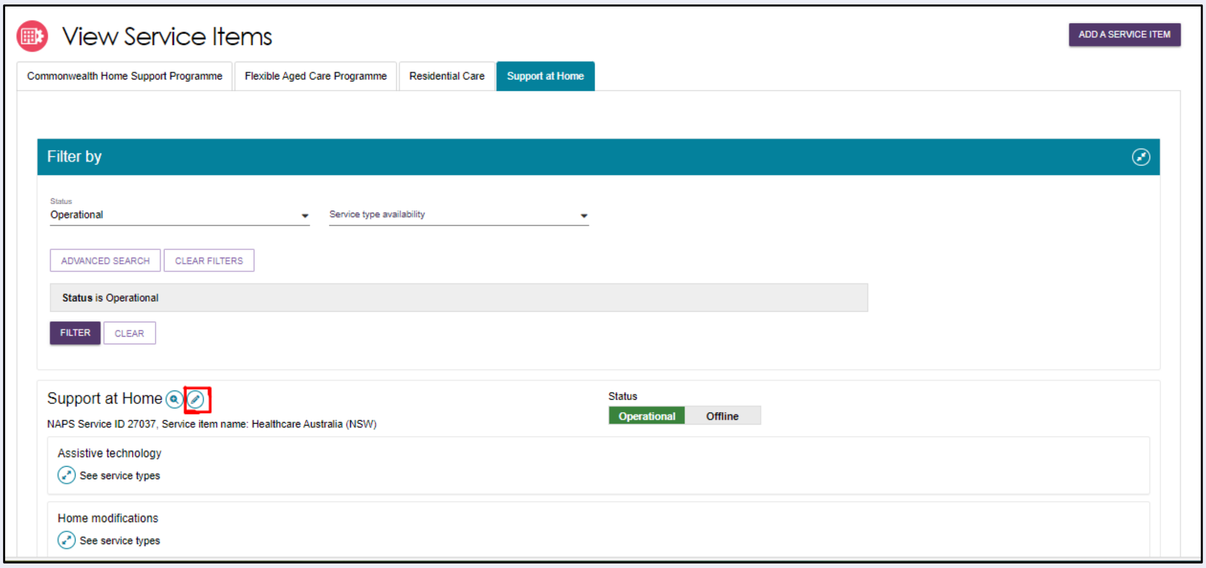


2. On the **View Service Items** page, select the **Edit** icon next to the relevant service item, or next to the 'Support at Home' heading.

NON-SUPPORT AT HOME EXAMPLE

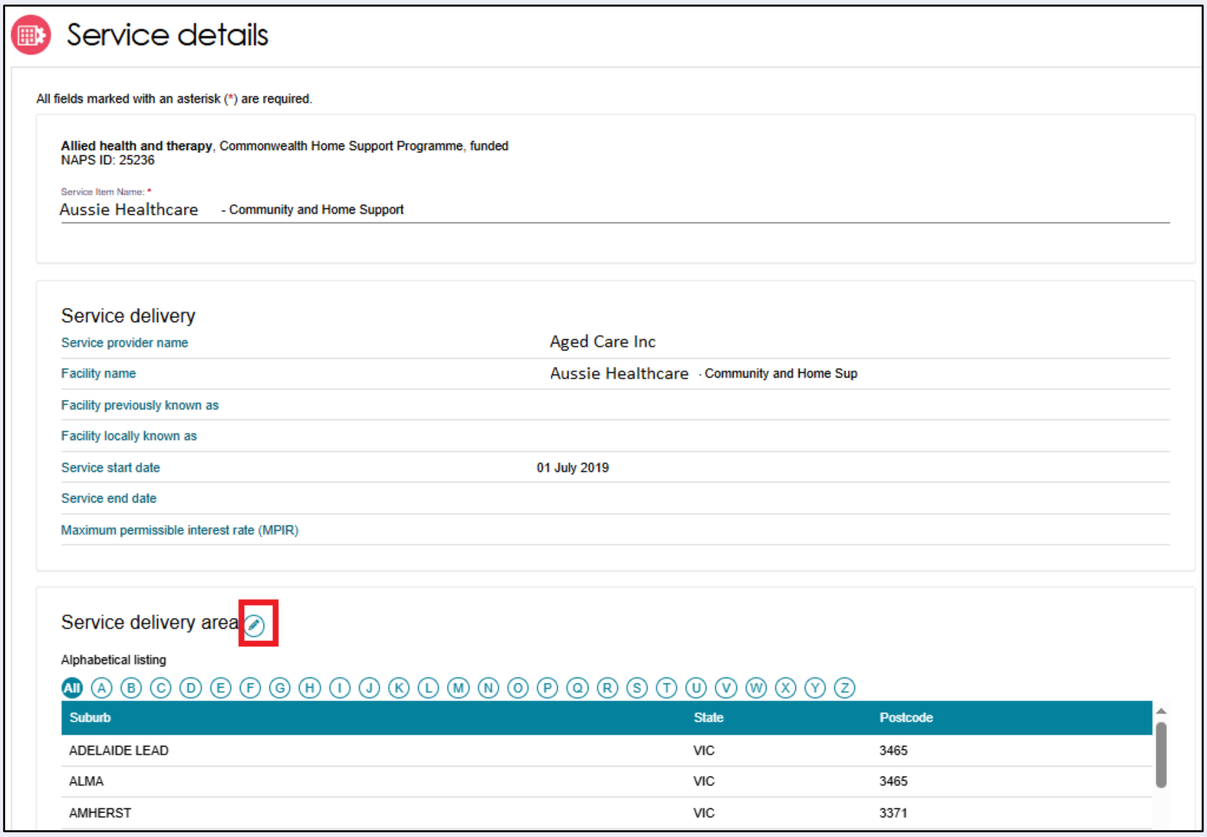


SUPPORT AT HOME EXAMPLE



3. The **Service details** page will display. Select **Edit** (Pencil) next to the **Service delivery area** section.

NON-SUPPORT AT HOME EXAMPLE



Service details

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

Allied health and therapy, Commonwealth Home Support Programme, funded
NAPS ID: 25236

Service Item Name: *
Aussie Healthcare - Community and Home Support

Service delivery

Service provider name	Aged Care Inc
Facility name	Aussie Healthcare - Community and Home Sup
Facility previously known as	
Facility locally known as	
Service start date	01 July 2019
Service end date	
Maximum permissible interest rate (MPIR)	

Service delivery area

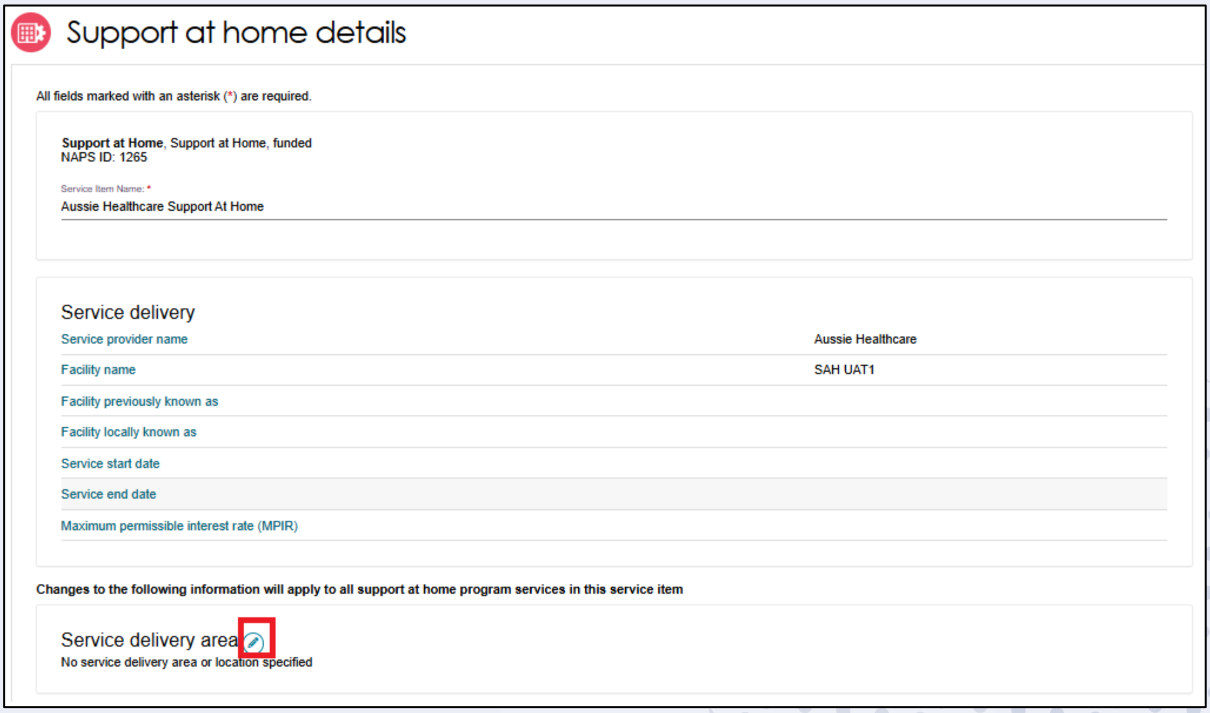
Alphabetical listing

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Suburb	State	Postcode
ADELAIDE LEAD	VIC	3465
ALMA	VIC	3465
AMHERST	VIC	3371

For Support At Home, there are no list of suburbs listed.

SUPPORT AT HOME EXAMPLE



Support at home details

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

Support at Home, Support at Home, funded
NAPS ID: 1265

Service Item Name: *
Aussie Healthcare Support At Home

Service delivery

Service provider name	Aussie Healthcare
Facility name	SAH UAT1
Facility previously known as	
Facility locally known as	
Service start date	
Service end date	
Maximum permissible interest rate (MPIR)	

Changes to the following information will apply to all support at home program services in this service item

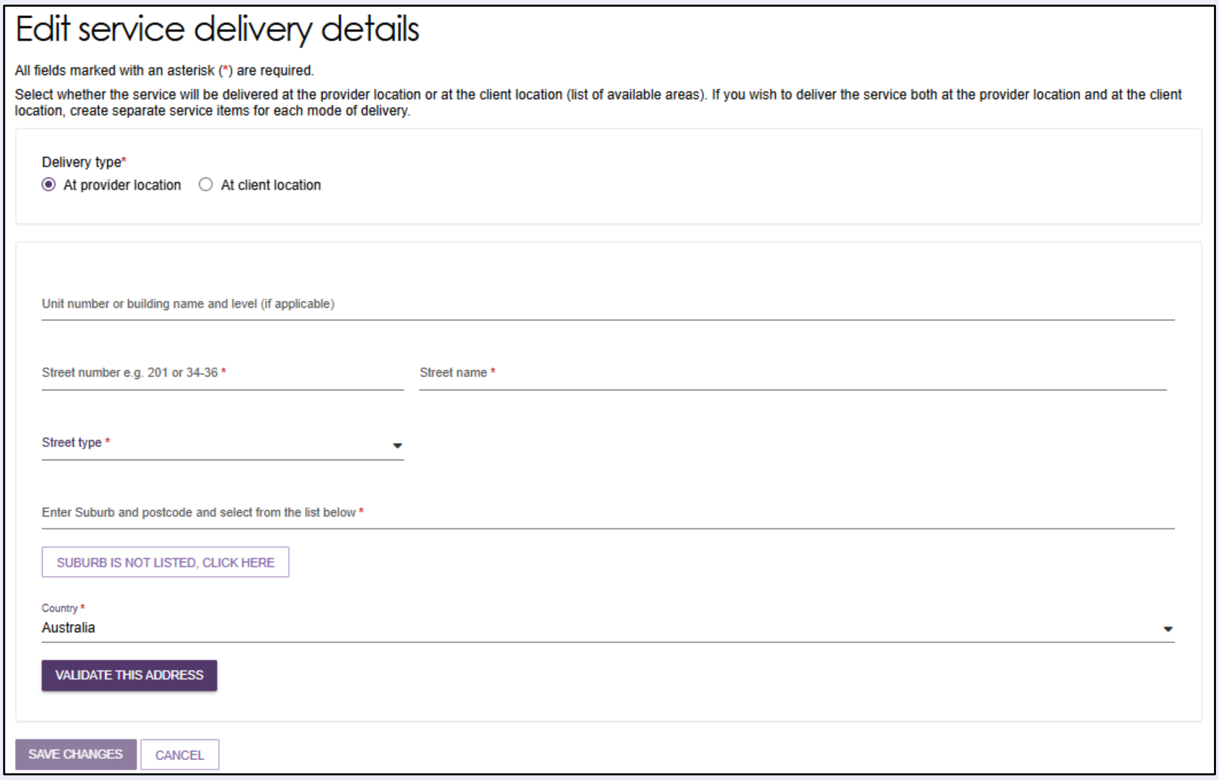
Service delivery area

No service delivery area or location specified

4. Select the service delivery type. For residential services, select **At provider location**. For non-residential services, select **At client location**.

This step does not apply to Support at Home – both location options will be greyed out.

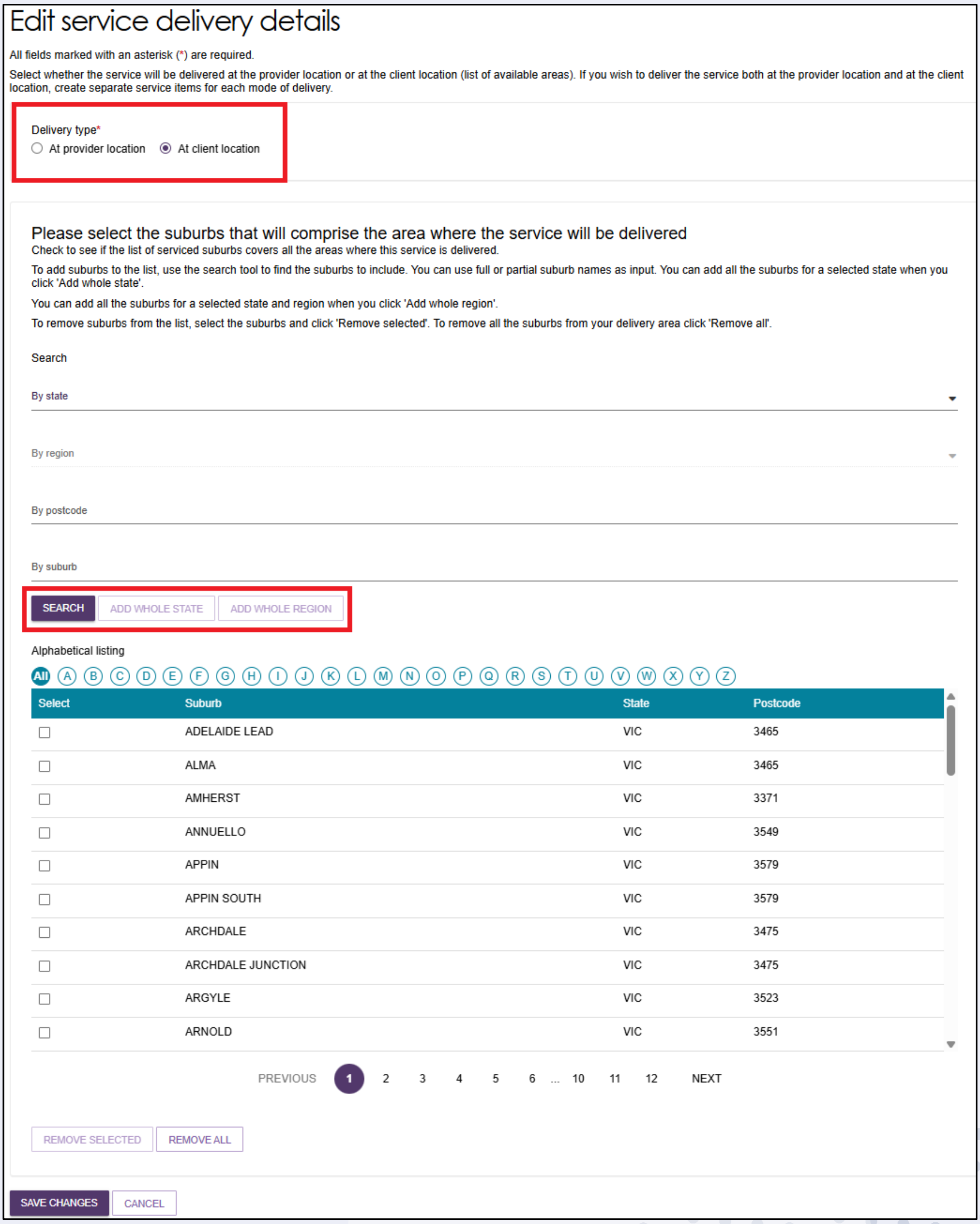
If you have selected **At provider location**, enter the address of the provider then select **Validate This Address**. Then select **Save Changes**.



If you have selected **At client location**, you can choose the state or suburb(s) the service is delivered in. By default, the entire region, in which you are funded to provide service, is selected.

You can choose to search for a specific suburb to add, add all the suburbs in the selected state, or add all the suburbs in the selected region. To remove suburbs from the list, select the suburbs you wish to remove using the checkbox and select **REMOVE SELECTED**, or use **REMOVE ALL** to start configuring your list of suburbs from the beginning.

Finally, select **Save Changes** to save the selected suburbs. Select **Cancel** to go back to editing the service.



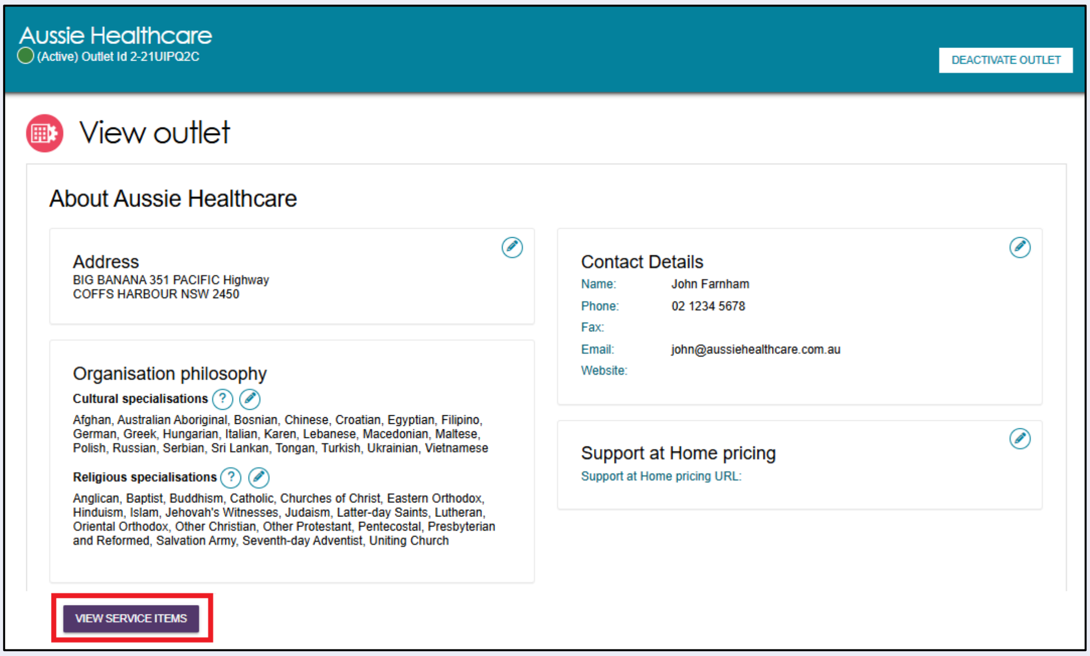
2.2.5 Attaching promotional material

Residential Care providers can add promotional material to be displayed in the service finder. Promotional material content will not appear on the Service Finder until it has been reviewed and approved by the Department. Approval takes two business days. Once approved, the material will be visible on the Service Finder on the My Aged Care website.

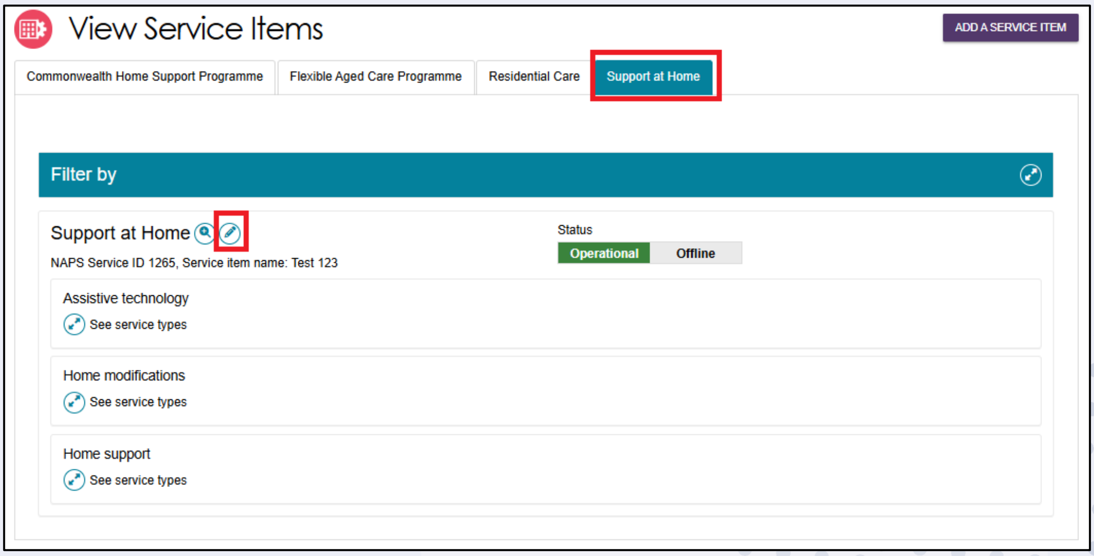
Support at Home, Transition Care and Commonwealth Home Support Programme (CHSP) providers have the option to attach promotional material in the portal; however, this material will not display on the service finder.

Follow these steps to attach promotional material (for example, photos, brochures, menus):

1. From the Outlet administration page, select the name of the outlet on the outlet card that you want to add a service item to. Then from the View Outlet page, select **View Service Items.**



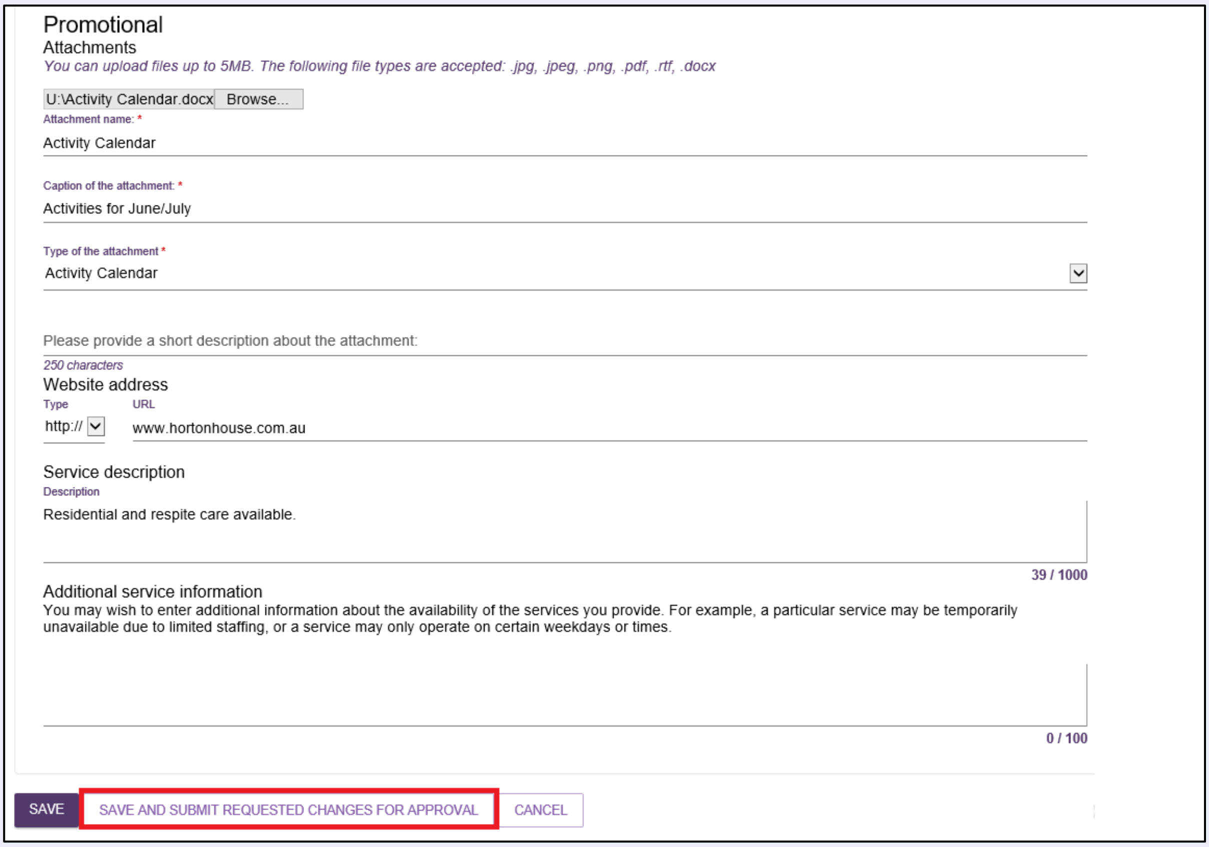
2. On the **View Service Items** page, select your program's tab (e.g. **Support at Home**) and Edit the relevant service item by selecting the Edit icon to the right of the service or program name.



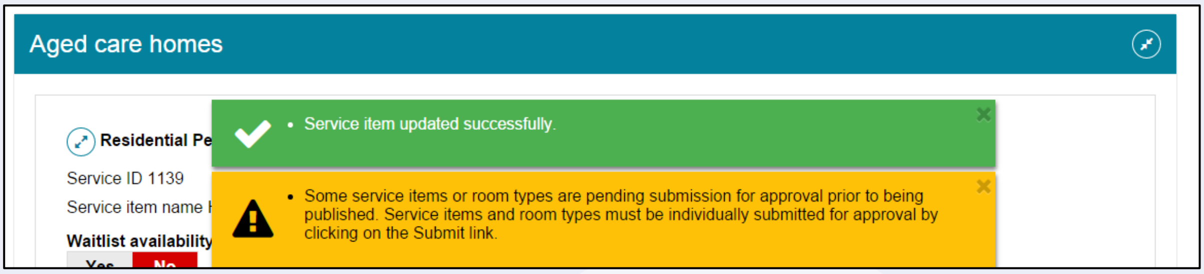
3. The **Service details** page will display.

Scroll down to the Promotional section. Select **Browse** to find and attach your promotional material (file types supported include .jpg, .jpeg, .png, .pdf, .rtf, .doc and .docx) and select **Save and Submit Requested Changes for Approval** after entering information about the attachment.

The **Feature Photo** option in the **Type of the attachment** dropdown will be the primary image displayed to users of the service finder.



At the bottom of the screen, a confirmation will display, and a warning message will prompt you to submit the service item update to the Department for approval.

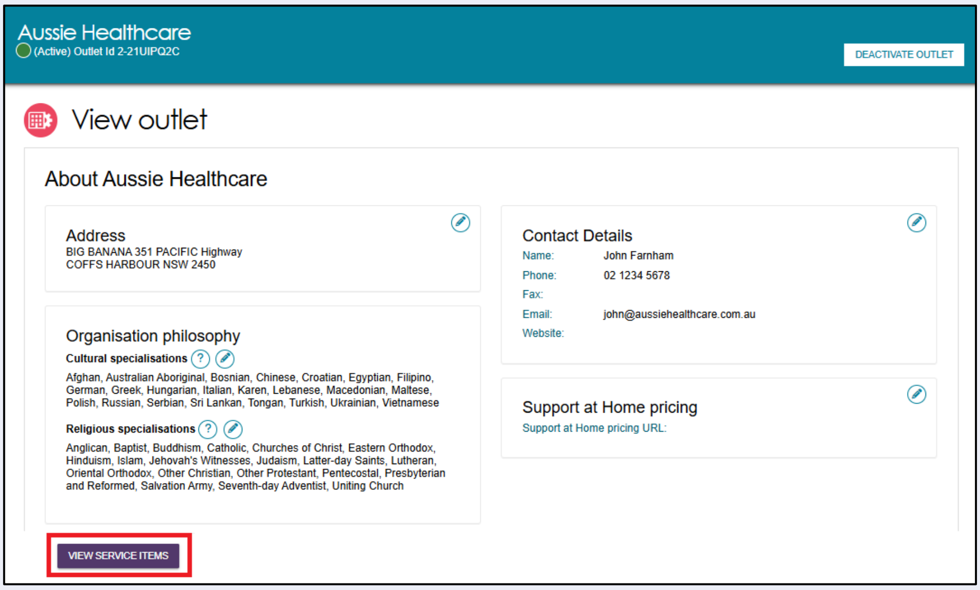


2.2.6 Removing a service sub-type

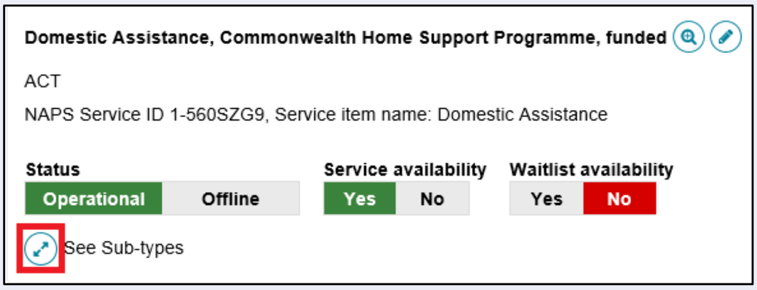
Follow these steps to remove a service sub-type for a service item (for non-Support at Home services).

> **!** Support at Home services are pre-populated based on what the outlet or organisation is approved for (Provider registered category) and therefore cannot be deleted or removed from the Service and Support Portal.

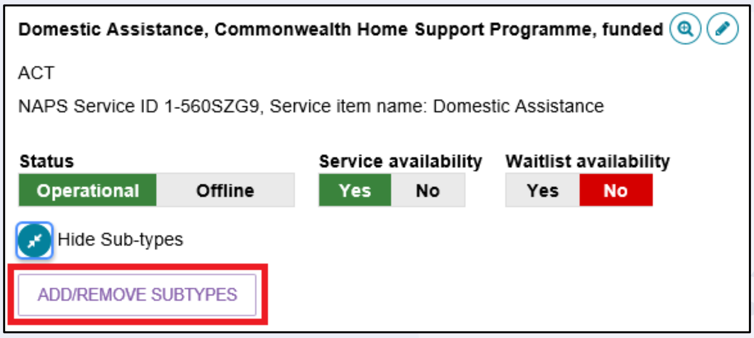
1. At the Outlet Administration Tile, Select the name of the outlet on the **Outlet card** you want to remove a service sub-type from. The **View outlet** page then appears. Select **VIEW SERVICE ITEMS**.



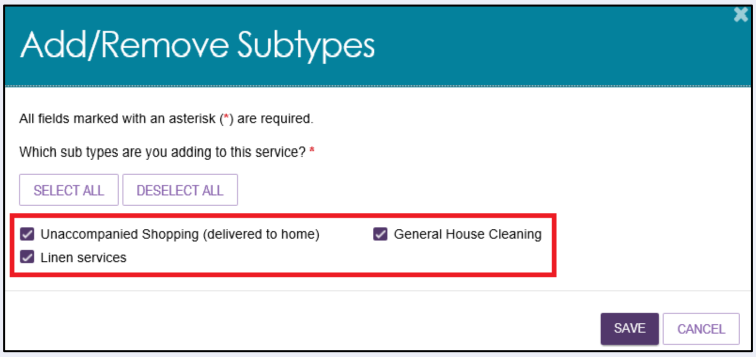
2. Select the blue arrow next to **See Sub-types** under the service to see expanded service details.



Then select **ADD/REMOVE SUBTYPES**.

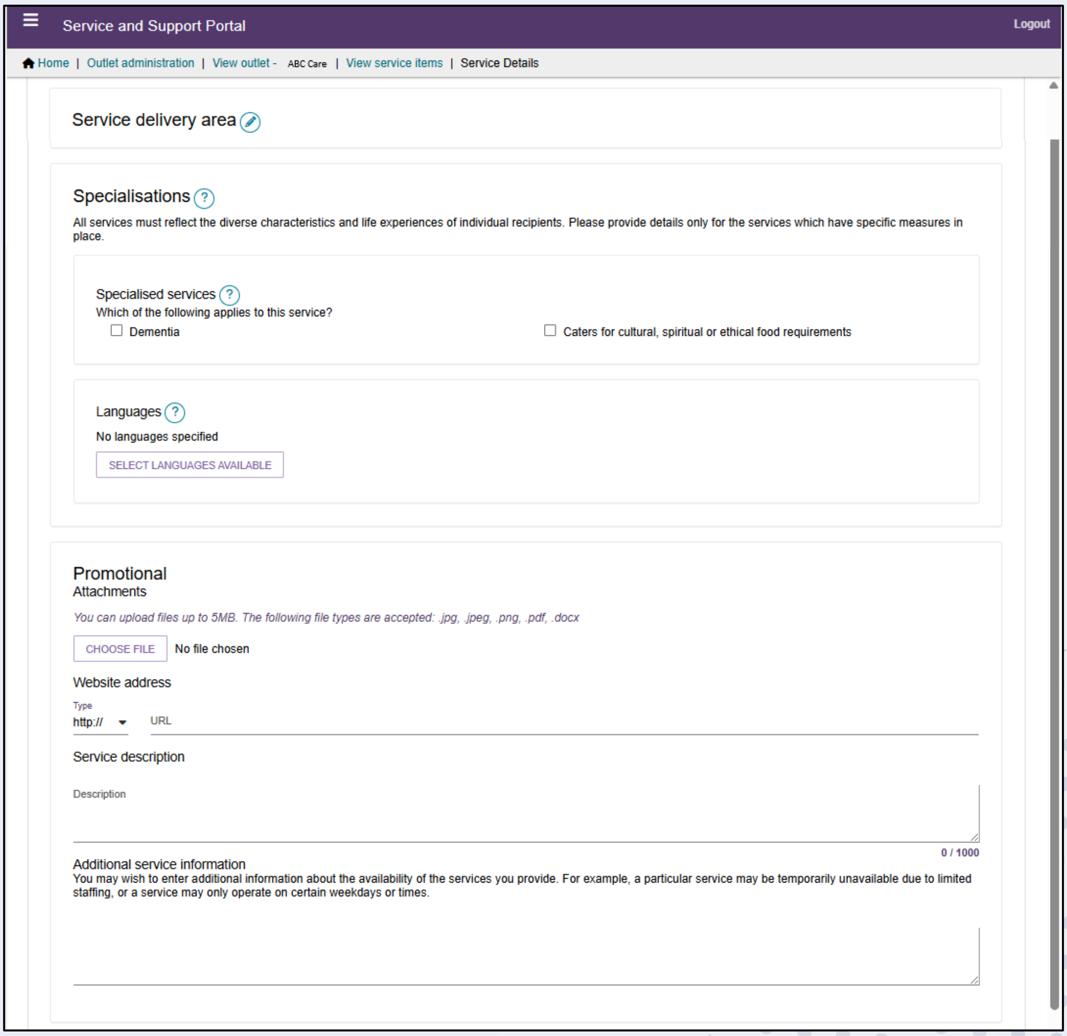


3. In the **Add/Remove Subtypes** box, deselect the service/s you want to remove from the service item and select **SAVE**. The service will then be removed, and information about the service will not display in the service finder. Note that when removing subtypes, there must be at least one service remaining.



2.2.7 Service attributes

When you are configuring a service, a number of attributes specific to the delivery of your particular service will become available to select and display on the service finder. These include Diverse Needs Specialisations, Specialised Services and others mentioned in this section. They can be found in the Service Details page of the service item, or the Support At Home Details page of the Support at Home service.

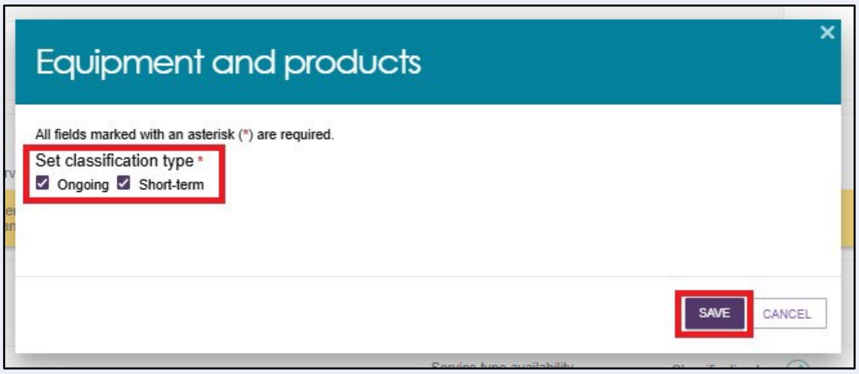


2.2.7.1 Classifications

For Support at Home services, you can modify the Classification type for either Ongoing or Short-term for each service type. For example, you prefer to offer a particular service type on an ongoing support period basis only.

1. Navigate to the Support at Home service type that you want to edit the classification type for, by following the steps in Editing a service item. Then, select Edit (Pencil) next to the Classification Type.

2. At the pop up, select Ongoing and/or Short-term and select **SAVE**.

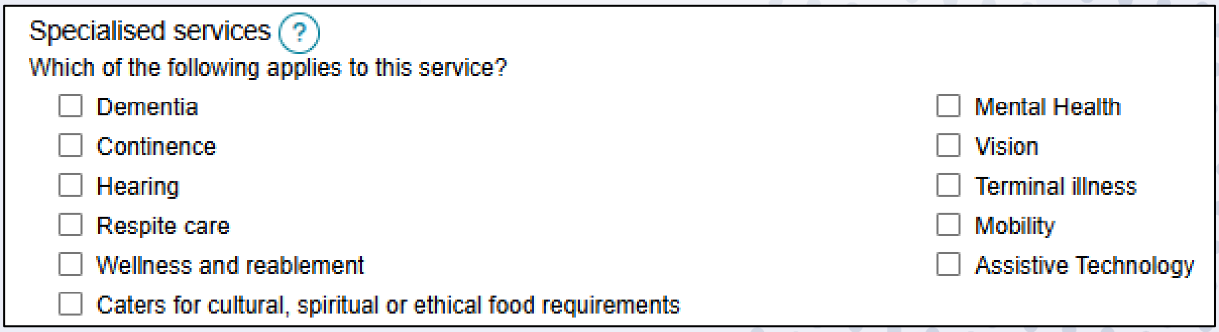


2.2.7.2 Specialisations

Specialisations is an umbrella term for 3 sub-groups: diverse needs, specialised services discussed below, and languages. Providers of all care types are able to identify their ability to provide services that cater to these specialisations.

You can indicate that a service or outlet offers the following **Specialised Services**. Although these services are not verified, please select only those with specific measures in place which demonstrate your specialised service offering.

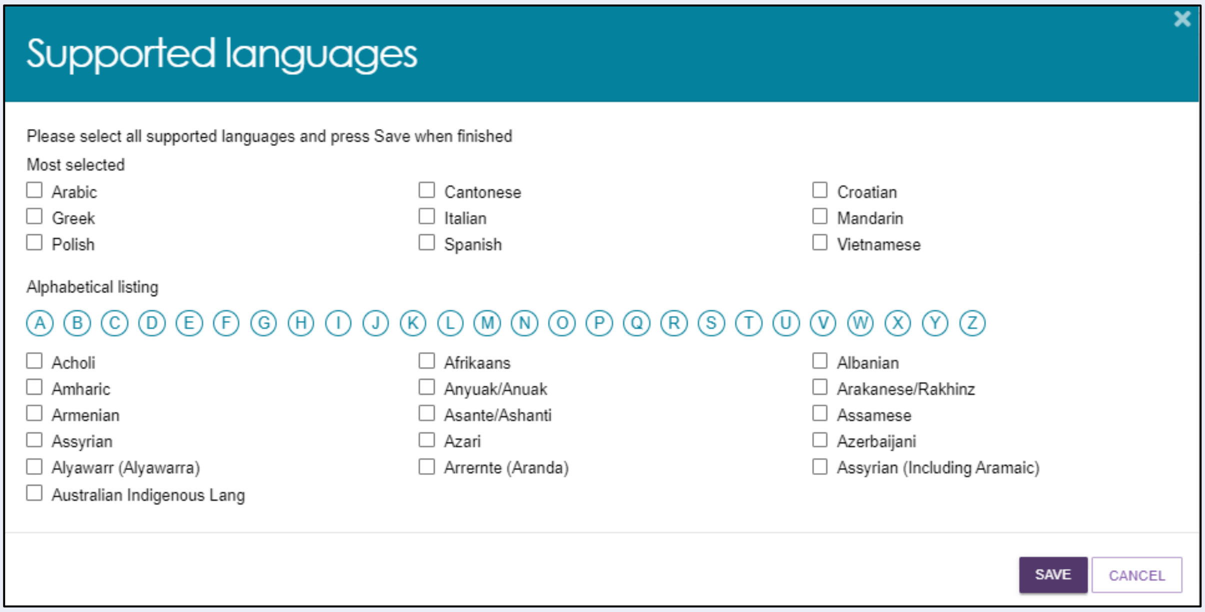
Specialised services will be displayed only for Support at Home and CHSP service items.



2.2.7.3 Languages

1. To indicate that services are being delivered in a language other than English, select **SELECT LANGUAGES AVAILABLE**.

2. Select one or more languages then select **SAVE**.



3. The languages will be displayed. Select the Pencil (edit) icon to change languages.

2.2.7.4 Hours of operation, staffing notes, transport notes

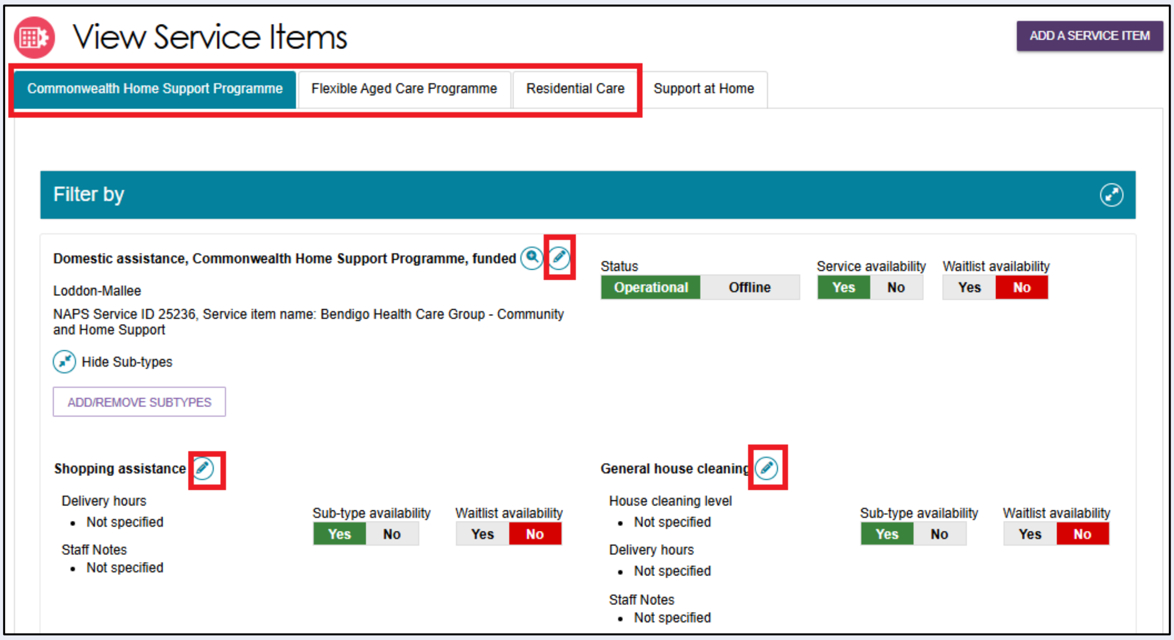
You can outline hours of operation for CHSP and some Support at Home services. By default, you can enter standard Monday to Friday, Saturday, and Sunday hours. You can also specify individual working days by using the **Customise** option.

To edit your hours of operation:

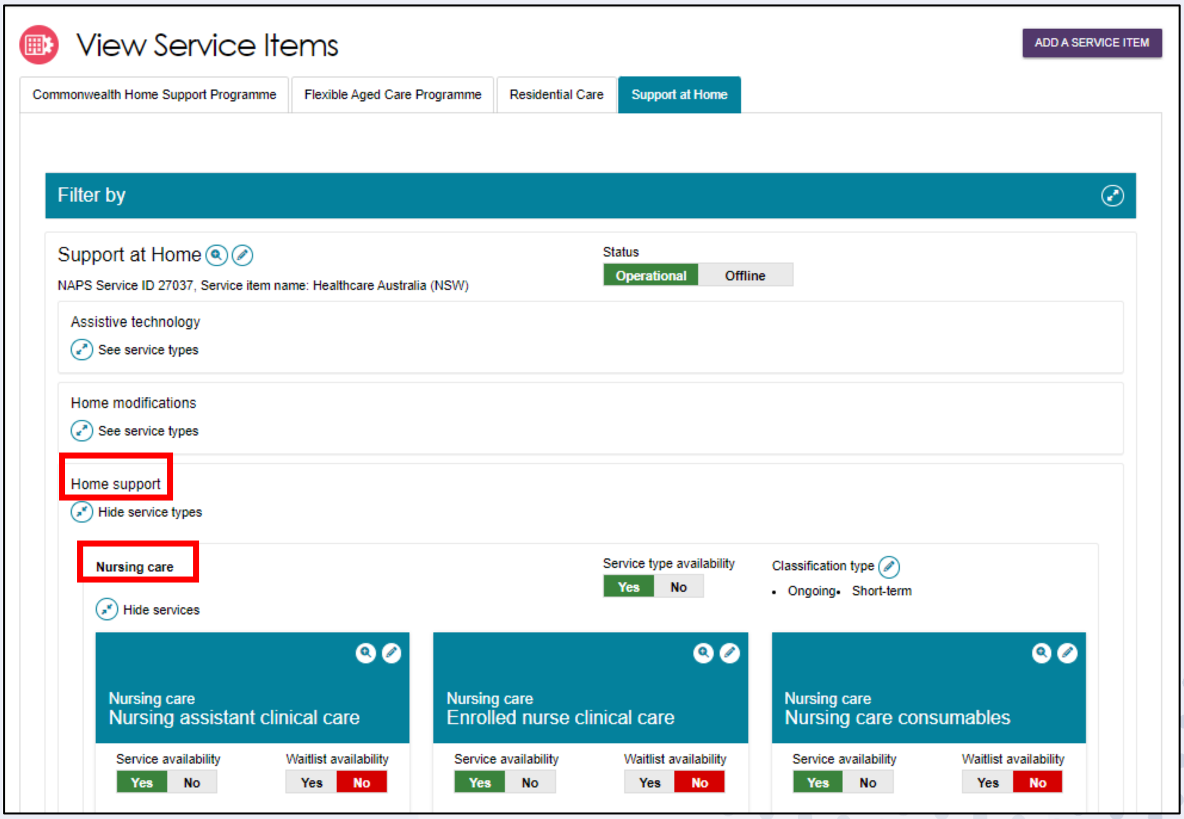
1. Navigate to the Support at Home service type that you want to edit by following the steps in Editing a service item.
2. Select the service you want to edit the hours of operation by selecting on the corresponding edit icon next to the service group, then the service sub-type.

   For Support at Home services, Expand the service group and/or service type, then select the Edit icon next to the service.

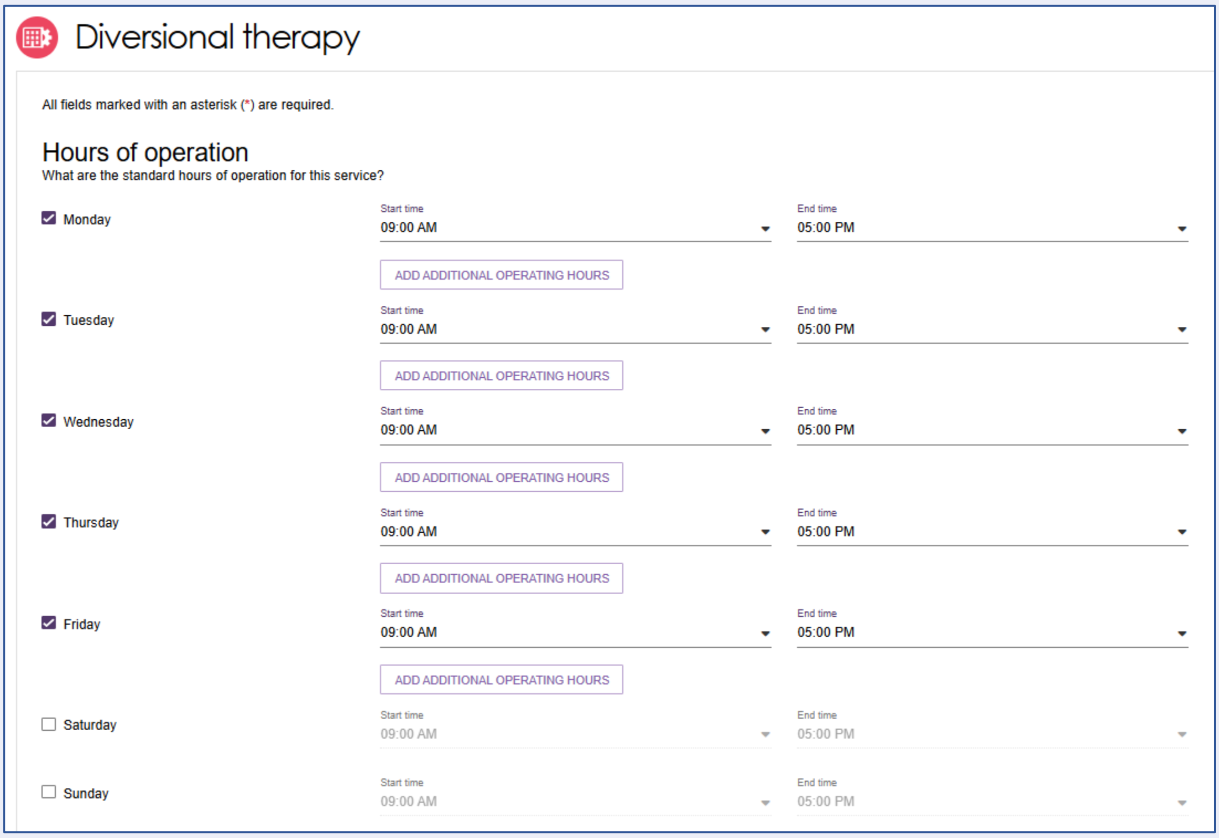
NON-SUPPORT AT HOME EXAMPLE



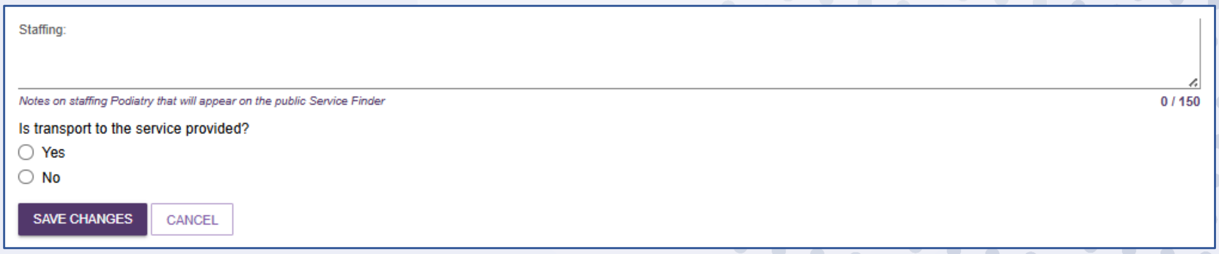
SUPPORT AT HOME EXAMPLE



3. Input the hours and save.

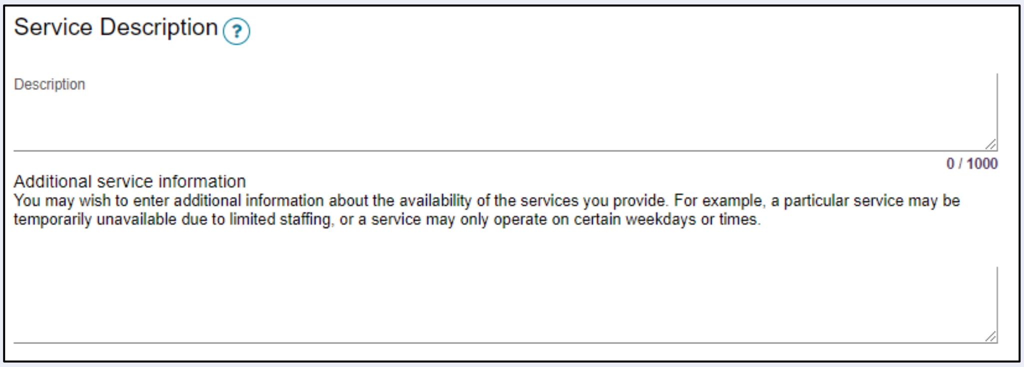


4. On the same page, depending on the service chosen, you can also **edit Staffing Notes** for the service, how the service is delivered, whether **Transport** is included, and [Pricing].



2.2.7.5 Service Description

You can enter any further information about your service here, and it will be displayed at the Service Finder.



2.2.7.6 Pricing Information (Support at Home)

This section covers pricing information for Support at Home only. For room pricing for Residential Care please refer to Rooms (Residential Care).

Support at Home program outlets must provide:

- a Pricing website link (URL)
- service level prices.

If pricing is not entered for Support at Home services, you will not be able to:

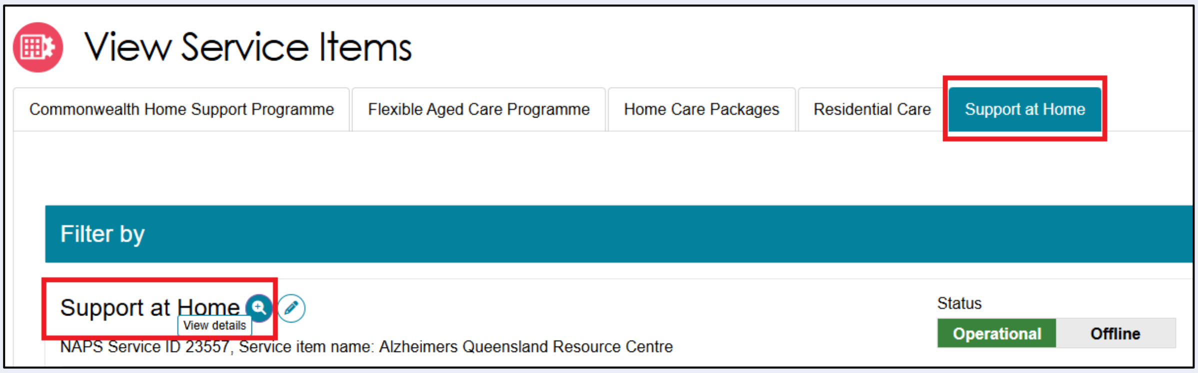
- save a new service and make it **Operational**
- save changes to partially complete existing pricing information
- confirm that pricing information has been reviewed, then pricing data will then not be supplied to My Aged Care to support tools such as the Fee Estimator.

! The Support at Home's service item allows you to configure the services you deliver and their prices for a particular delivery area or region.

! Pricing is entered at the service level for each service item within the outlet.

To view outlet-wide information for Support at Home:

1. Select the outlet from the Outlet Administration tile, then select 'View Service Items'.
2. select the Support at Home tab, then select the Magnifying Glass (view) icon to the right of the 'Support at Home' heading.

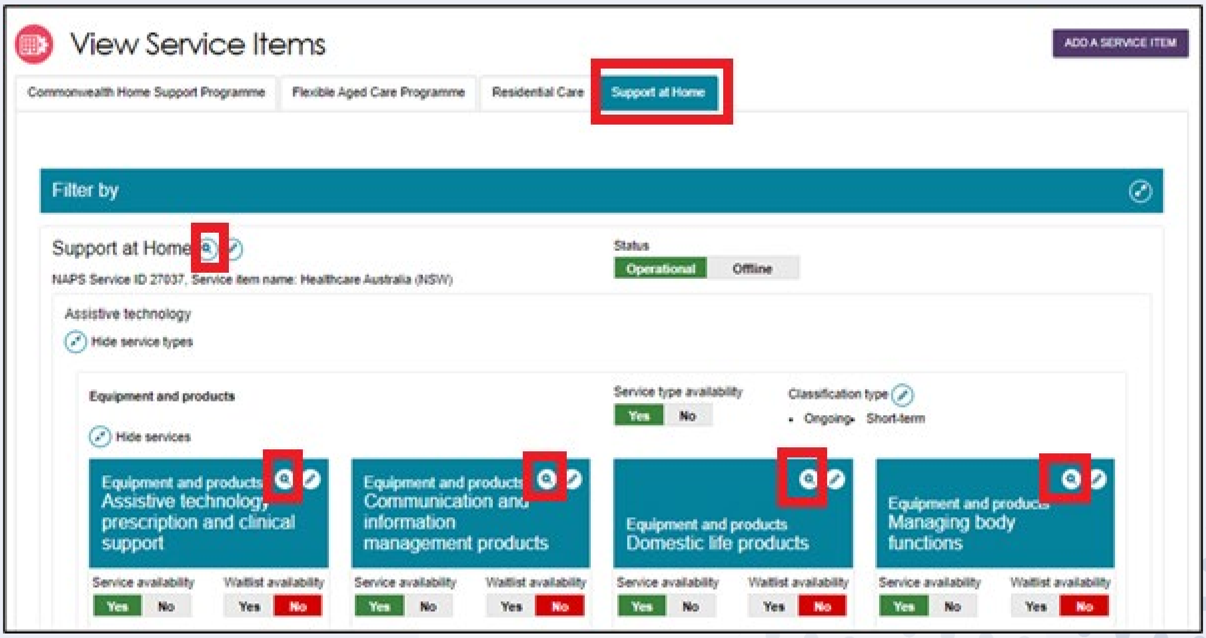


To view individual Support at Home services:

1. Select the outlet from the Outlet Administration tile, then select 'View Service Items'.
2. select the Support at Home tab, then expand any service groups and service types, then select the Magnifying Glass (view) icon of the appropriate service card.

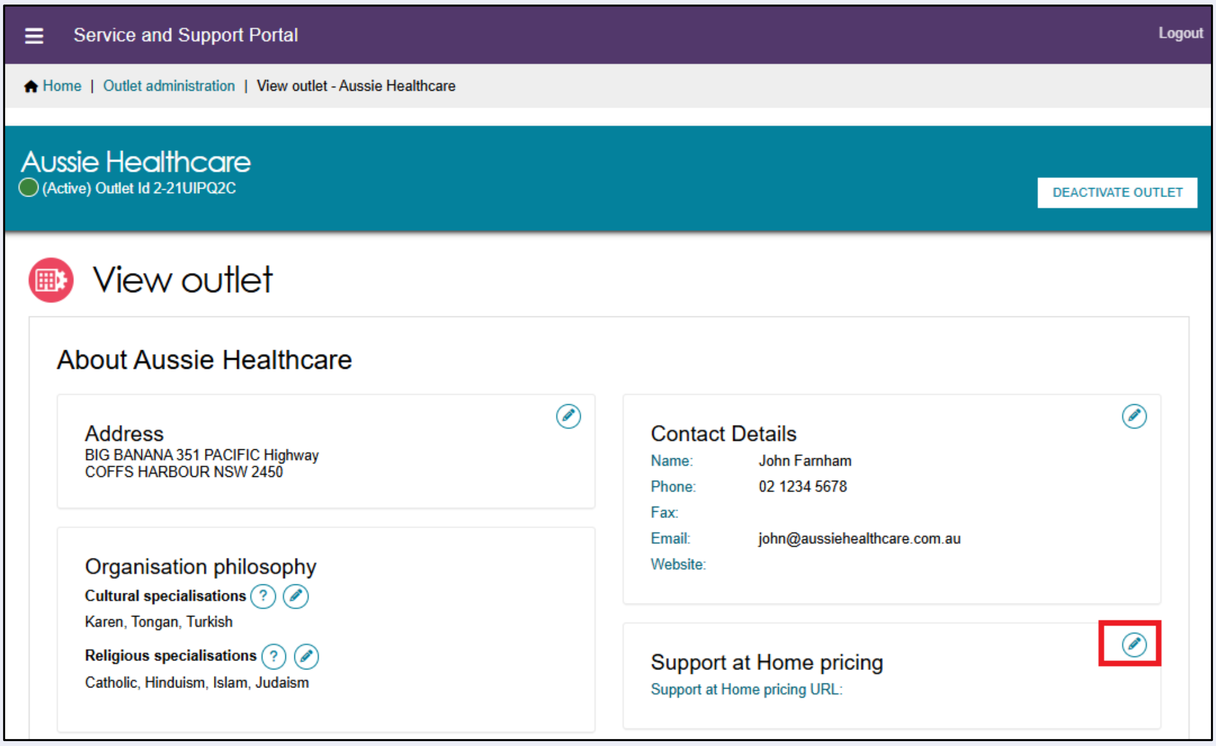
   For example, the below image shows:

   - the Assistive technology service group
   - the Equipment and products service type
   - four services: Assistive technology prescription and clinical support, Communication and information management products, Domestic life products, and Managing body functions.



2.2.7.6.1 Updating Pricing Information at the Outlet Level

1. Choose your outlet from the Outlet Administration tile. Then select the Edit (pencil) icon to the right of the **Support at Home pricing** section.

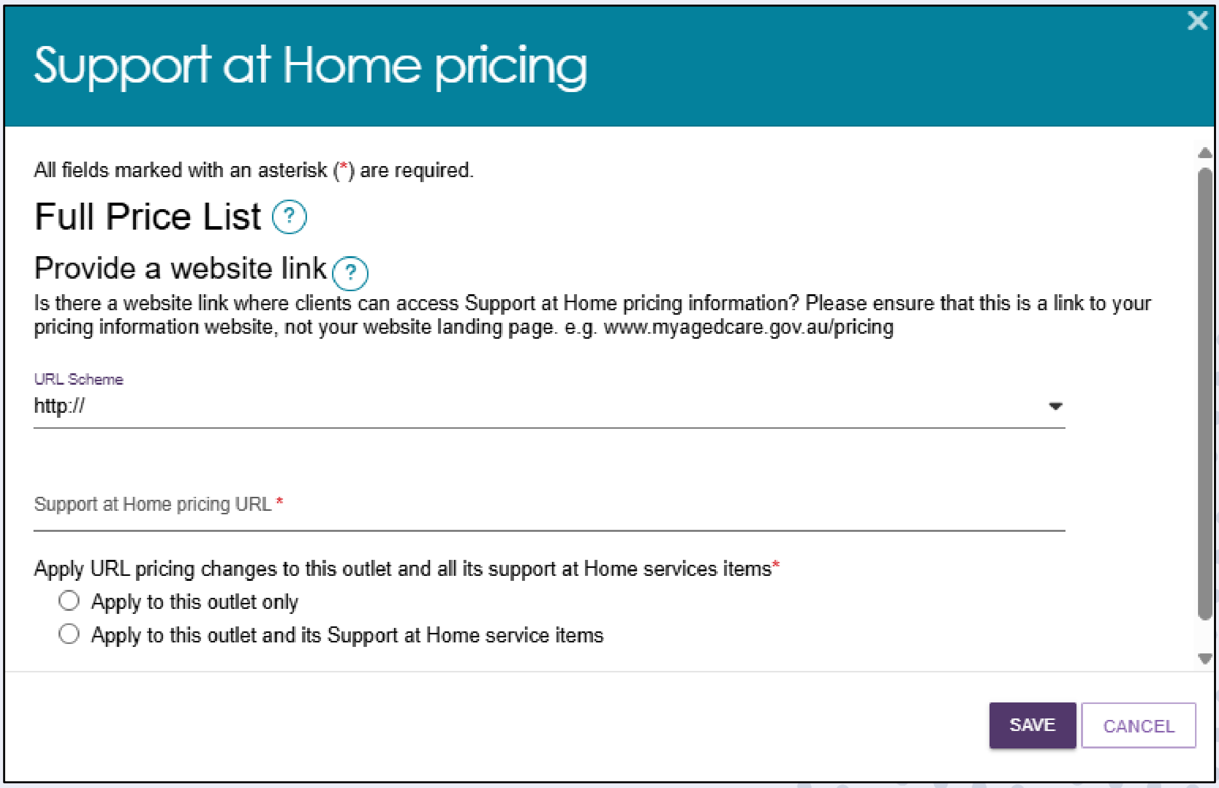


2. The Support at Home pricing pop up appears.

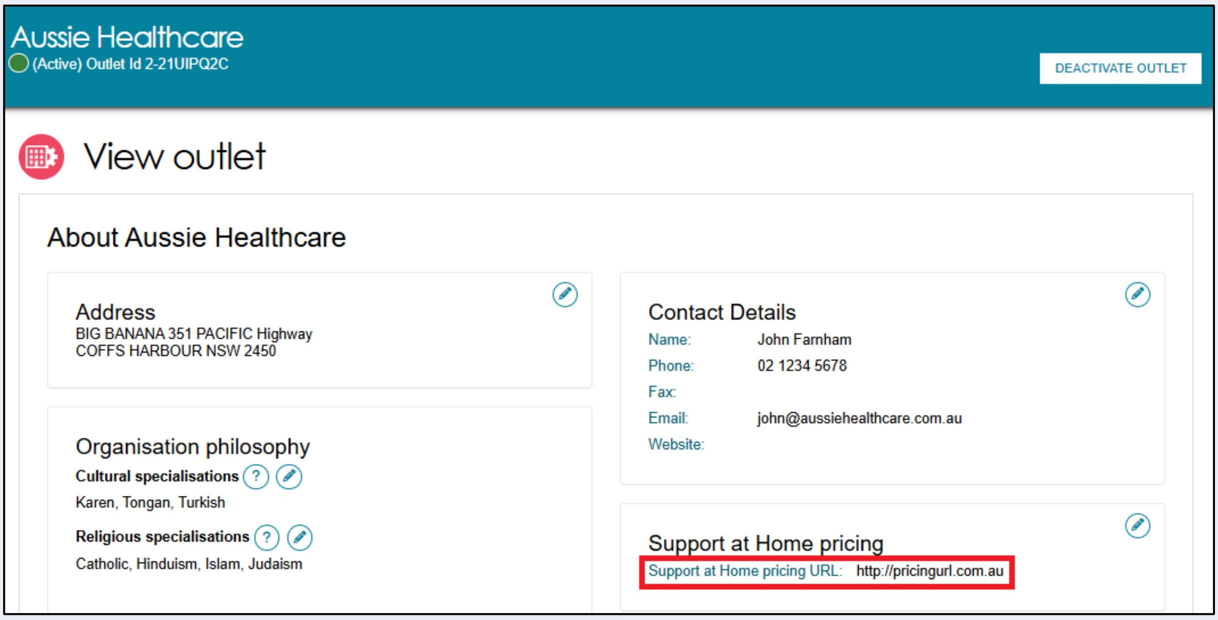
Under the **Full Price List** section, a pricing schedule website link (URL) can be added.

To add a pricing schedule website link type in the URL in the **Provide a website link** section. Ensure that the website URL you enter is a valid website address. Use the URL Scheme field to select the if the URL is https:// or http://.

Finally, select whether you want to **apply URL pricing changes to this outlet only**, or **apply to this outlet and all its Support at Home service items**. Then, select **Save**.



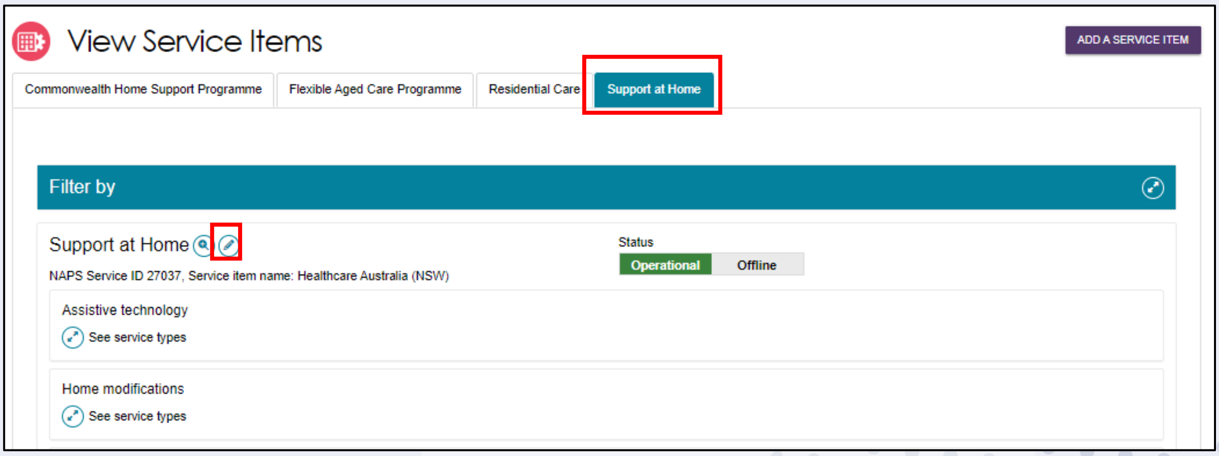
3. The Pricing URL will now appear at the View Outlet page.



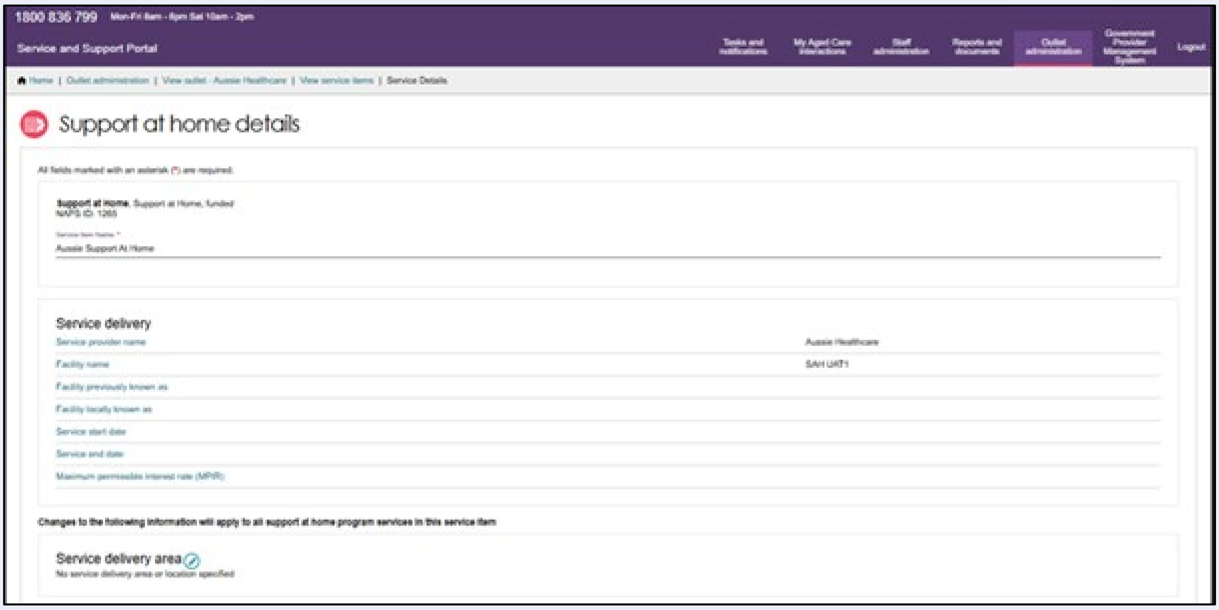
2.2.7.6.2 Updating Pricing Information at the Service Item Level

You can also update the service item pricing URL or supply a price schedule attachment specific to that delivery area/region.

1. Choose your outlet from the Outlet Administration tile, then select **View Service Items**.
2. From the View Service Items page, select the Support at Home tab, then the Edit (Pencil) icon to the right of the 'Support at Home' heading.



3. The Support at Home details Page appears. This contains all configuration available for the service item.



4. Scroll to the bottom of the page to the **Full Price List** section.

   In the URL Scheme section, select whether your website link is HTTP or HTTPS. Then, enter the website link in the URL section. The below screenshot shows an example website link.

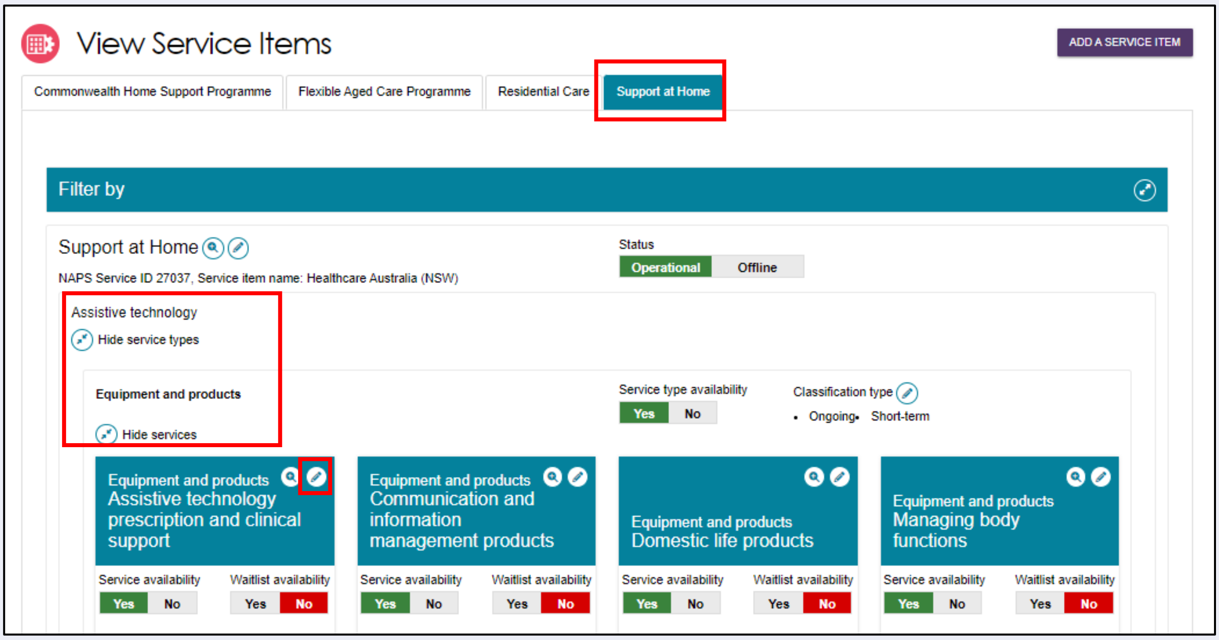
   You can also upload a pricing schedule here.

   Finally, select **Save**,

2.2.7.6.3 Updating Pricing Information at the Service Level

At the service level, you can update pricing based on the unit type e.g hourly, trips for individual services.

1. Go to the individual Support at Home service.
2. Select the Support at Home tab, then expand any service groups/service types, then select the Edit (Pencil) icon of the appropriate service card.



Update the **Pricing for service section** (if applicable), such as Common Price - Standard, non-standard, Saturday, Sunday, and Public Holiday. You must at a minimum provide the common price for standard hours.

! It is important to provide pricing at the service level to support My Aged Care website tools such as Find a Provider or Fee Estimator. There is flexibility to have service level availability and pricing by region.

This will be required to be completed for all services before changing the service item status to **Operational**.

Consumables based services will default to ‘Market price’. No price is required to be entered.

3. If a service is on a waitlist, it is highly recommended to add service pricing to ensure this is visible on the Service Finder or Fee Estimator tools.
4. All pricing information saved, including pricing schedule attachments, will appear by the next day on the Service Finder on the My Aged Care website, and do not require approval from the Department.

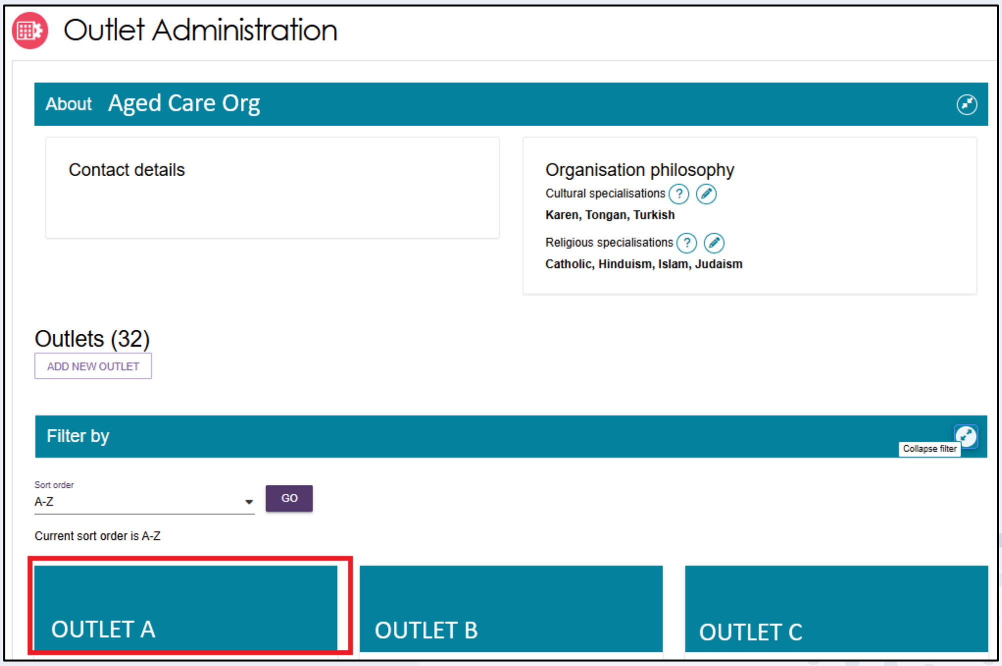
2.2.7.7 Rooms (Residential Care)

2.2.7.7.1 Add a room type

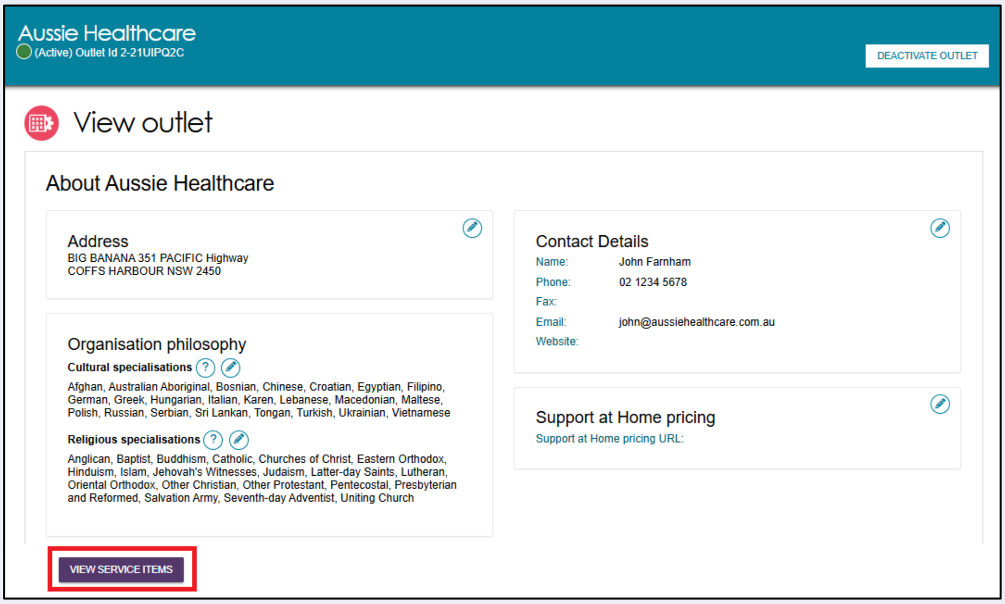
! This section applies to Residential Care only and does not apply to Commonwealth Home Support Program or Support at Home programs.

Residential Care providers can add information about the types of rooms their organisation offers. Follow these steps to add a room and room information. Fields marked with an asterisk (*) are mandatory.

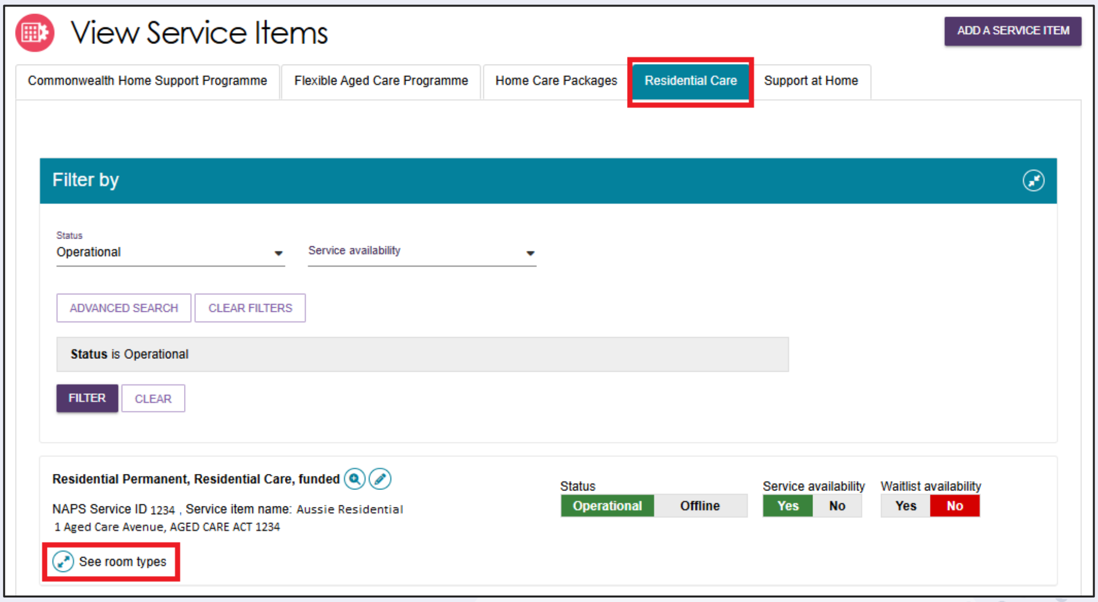
1. Select **Outlet administration** from the homepage. Select the name of the outlet on the **Outlet Card** you want to add room information to.



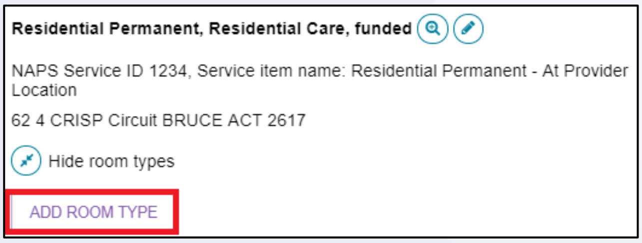
2. The **View outlet** page appears. Select the **VIEW SERVICE ITEMS** button.



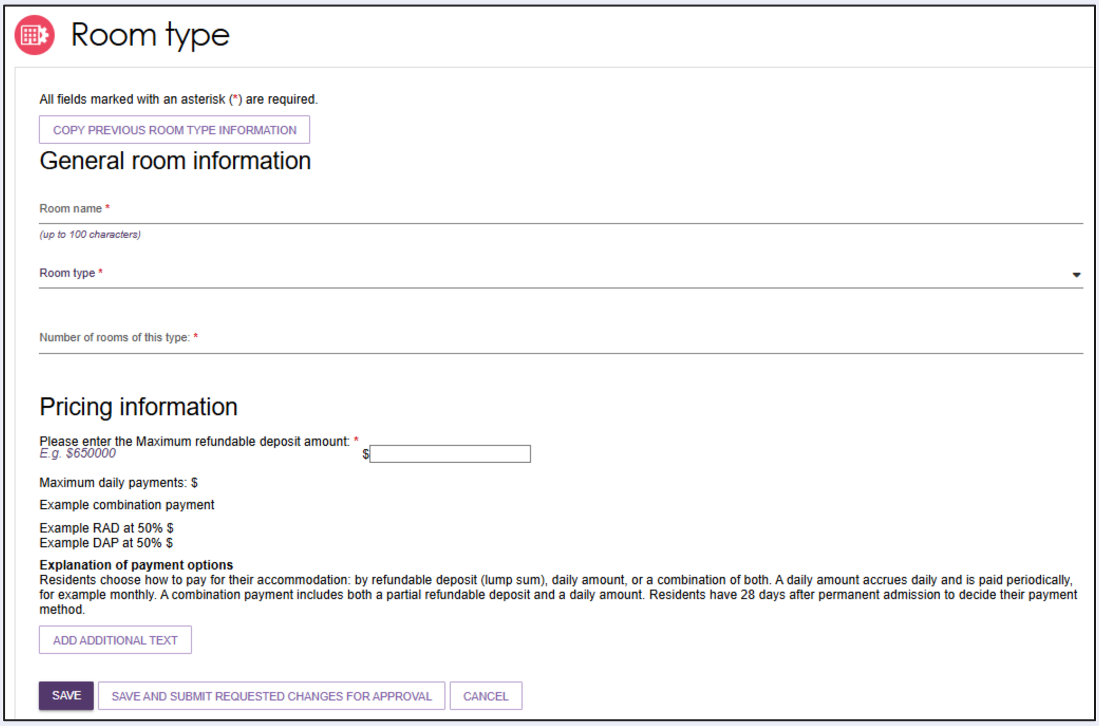
3. From the View Service Items page, select **Resident Care** from the tab options. Choose your service. Select **Expand** (blue arrow) next to **See room types**.



Then Select **ADD ROOM TYPE**.



4. The Room Type page appears. Enter required information in the **General room information** and **Pricing information** sections. Ensure mandatory fields (red asterisk) are completed.


Room type

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

COPY PREVIOUS ROOM TYPE INFORMATION

General room information

Room name *

(up to 100 characters)

Room type *

Number of rooms of this type: *

Pricing information

Please enter the Maximum refundable deposit amount: *
E.g. $650000 $

Maximum daily payments: $

Example combination payment

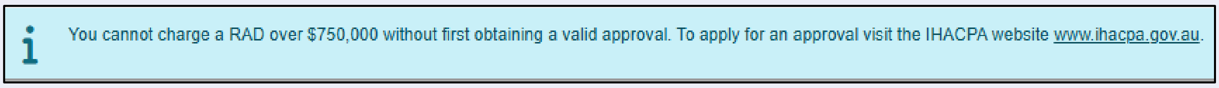
Example RAD at 50% $
Example DAP at 50% $

Explanation of payment options
Residents choose how to pay for their accommodation: by refundable deposit (lump sum), daily amount, or a combination of both. A daily amount accrues daily and is paid periodically, for example monthly. A combination payment includes both a partial refundable deposit and a daily amount. Residents have 28 days after permanent admission to decide their payment method.

ADD ADDITIONAL TEXT

SAVE | SAVE AND SUBMIT REQUESTED CHANGES FOR APPROVAL | CANCEL

- In the Pricing Information section, enter the room's **Maximum Refundable Deposit (RAD)** around. If you enter an amount over $750,000, the following information banner will appear.


You cannot charge a RAD over $750,000 without first obtaining a valid approval. To apply for an approval visit the IHACPA website www.ihacpa.gov.au.

To publish and charge a room price above a RAD of $750,000 (or the equivalent daily payment), you must have a valid approval from the Independent Health and Aged Care Pricing Authority (IHACPA), formerly known as the Aged Care Pricing Commissioner.

! If you do not have approval for your RAD price for the room type, you cannot publish or charge this price. Conditional approval does not constitute approval until you have received a satisfaction of conditions letter from IHACPA.

The below fields will appear and need to be completed for rooms priced over $750,000.

- **Approval** or **Conditional Approval**
- **Date of IHACPA approval** (or Aged Care Pricing Commissioner approval) – IHACPA approvals are valid for 4 years. Once you enter the required approval details for a room, you will receive automatic notifications when your approval is nearing expiry. These will be sent at 6, 4 and 2 months before your Date of IHACPA approval indicates expiry. Rooms will be removed from My Aged Care if 4 years passes from your Date of IHACPA approval.
- **IHACPA approval reference number** – This is only required if your approval was granted on or after 1 July 2024. Approval letters issued prior to 1 July 2024 do not have an approval number.
- You will also need to attach and name the **IHACPA approval letter** for the room.

IHACPA approval details

As the RAD exceeds $750,000, what type of approval do you have for this room?*

◉ Approval ○ Conditional Approval

Date of IHACPA approval: *

Find this date in your IHACPA approval letter for this room. (e.g. dd/mm/yyyy)

IHACPA approval reference number:

Find this number in your IHACPA approval letter for this room.

Please attach the IHACPA approval letter for this room. *

You can upload files up to 5MB. Please ensure the letter is in a .pdf format. This letter will not be displayed on My Aged Care.

CHOOSE FILE No file chosen

Attachment name: *

- Enter the required information under **Key feature statement**.

Key feature statement

Room description: *

0 / 2000

Room size (in square metres): *

(up to 50 characters. e.g. 30m2 or 30sqm)

Common areas description: *

0 / 2000

Specific accommodation or design features

- (•) Not applicable
- ( ) Applicable

Additional care and services included in room price

- (•) Not applicable
- ( ) Applicable

Additional care and services available at additional cost

- (•) Not applicable
- ( ) Applicable

Extra service fee

- ( ) Yes
- (•) No

When entering room size (in square metres):

- if there is variation in room sizes, enter the size range of the room type from smallest to largest, e.g. 20sqm - 25sqm.
- indicate if the room size entered includes ensuite, e.g. 20sqm - 25sqm incl. ensuite.
- do not include private outdoor areas such as balconies or courtyards.
- Please ensure that the room size entered aligns with information provided to IHACPA in your application for these rooms.

5. Select **SAVE AND SUBMIT REQUESTED CHANGES FOR APPROVAL**.

SAVE | SAVE AND SUBMIT REQUESTED CHANGES FOR APPROVAL | CANCEL

! If you select **SAVE**, this room information will be saved only and not submitted for publication.

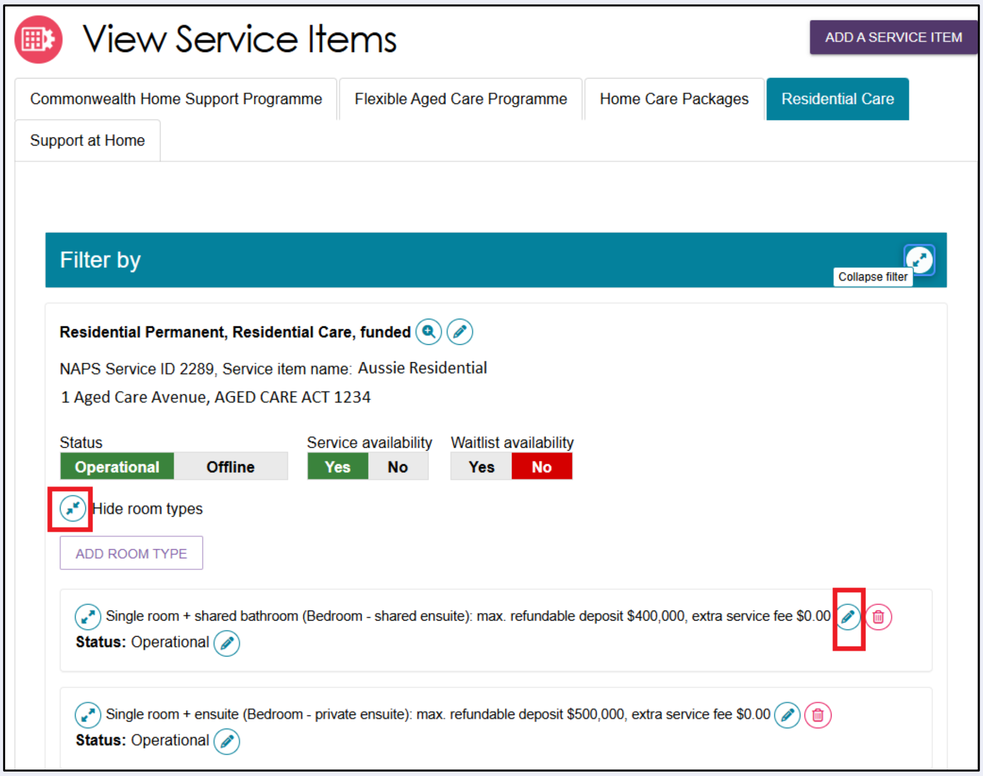
This room information will be displayed on the service finder once approved for publication by the Department (allow three business days).

If your room is not approved for publication, you will receive an email explaining the action you need to undertake before resubmitting. You can update your room request and submit again.

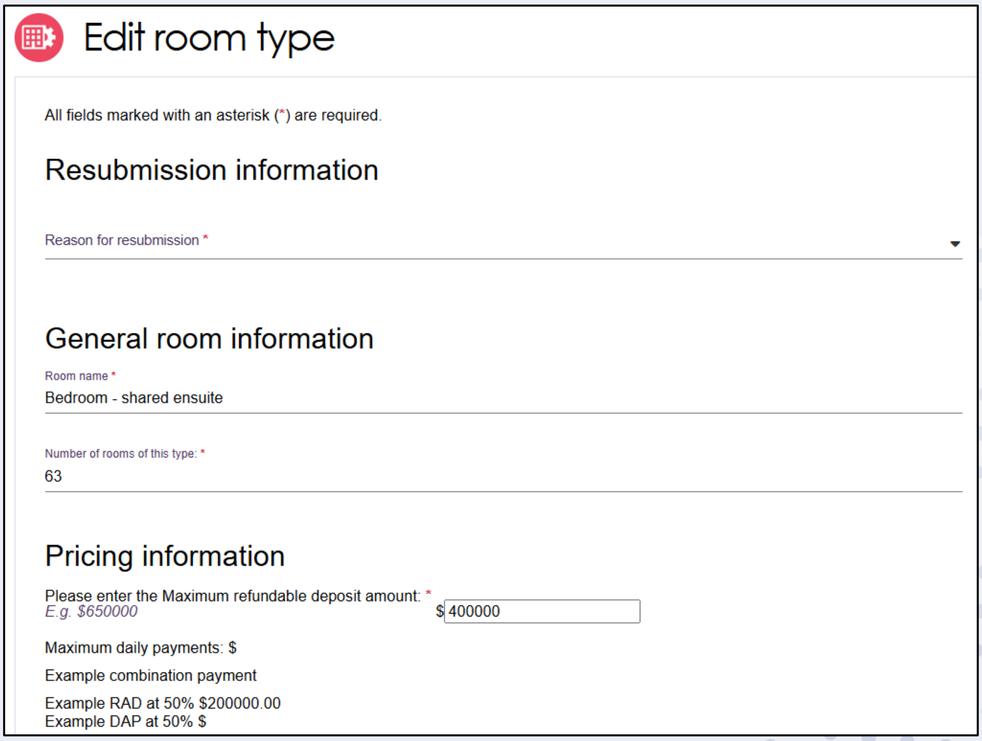
2.2.7.7.2 Edit room details

Residential Care providers can edit existing room information. Follow these steps to edit a room. Fields marked with an asterisk (*) are mandatory.

1. To edit the details for a room, select the **edit** (pencil).icon next to the room's listing.



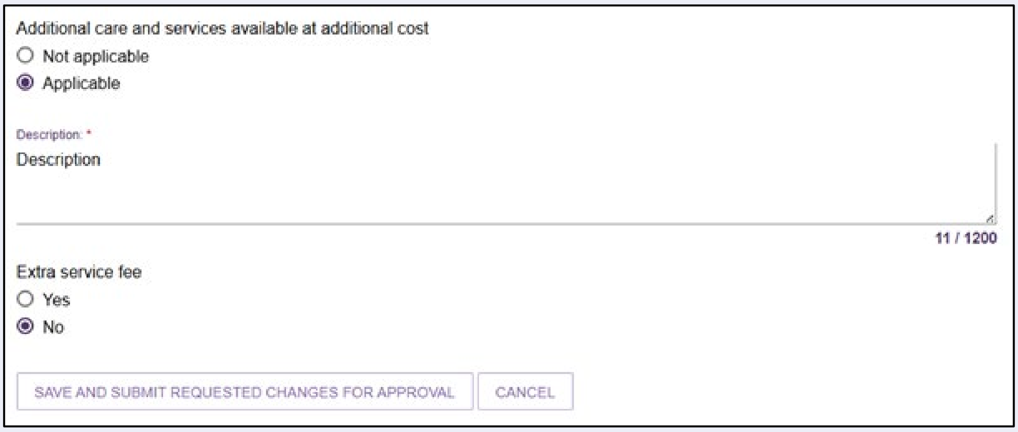
2. The **Edit Room Type** page appears. Select the reason for resubmission from the drop-down menu and the continue to edit the details of the room.



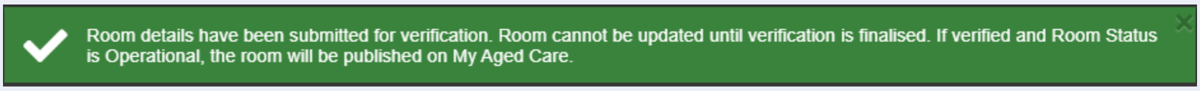
! Providers with an IHACPA approved maximum RAD over $750,000, can index the room price in line with legislation. For details on calculating the indexation of approved RADs visit www.ihacpa.gov.au.

If you have selected **Indexation of approved max RAD** as the **Reason for resubmission**, you can only change the room price. If you wish to change other fields for the room, select a different resubmission reason**.**

3. Scroll down to the bottom of the page. Select **SAVE AND SUBMIT REQUESTED CHANGES FOR APPROVAL**.

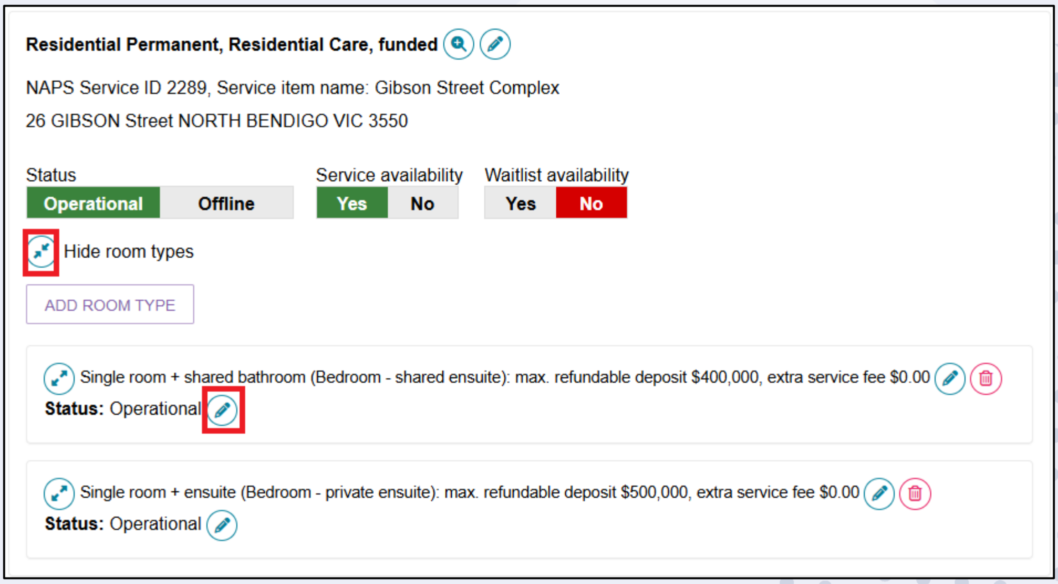


Once submitted, you will be redirected back to the View Service Items page and a green banner will display at the bottom of the screen confirming the edits were successfully submitted.



2.2.7.7.3 Change room status

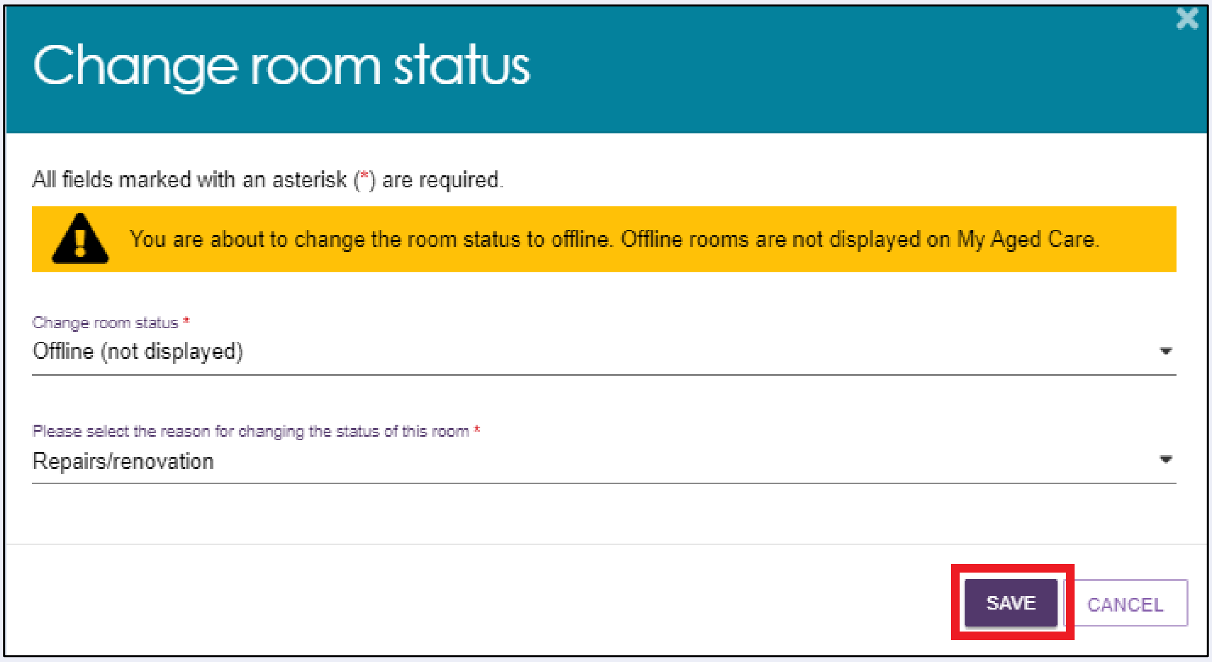
1. Select the edit icon (pencil) next to the **Status** of the room you want to set as **Offline** or **Operational**.



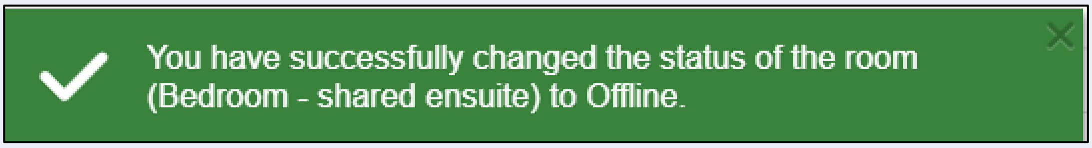
2. From the pop-up select **Offline (not displayed)** from the change room status and select the reason for the change.

When you set the room to **Offline** a warning banner will appear advising that offline rooms are not displayed on My Aged Care.

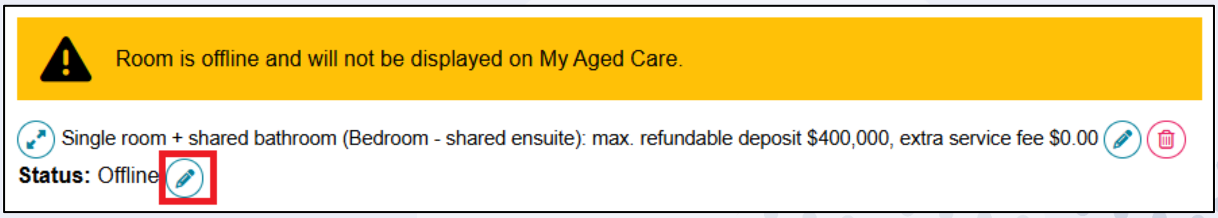
Select **SAVE**.



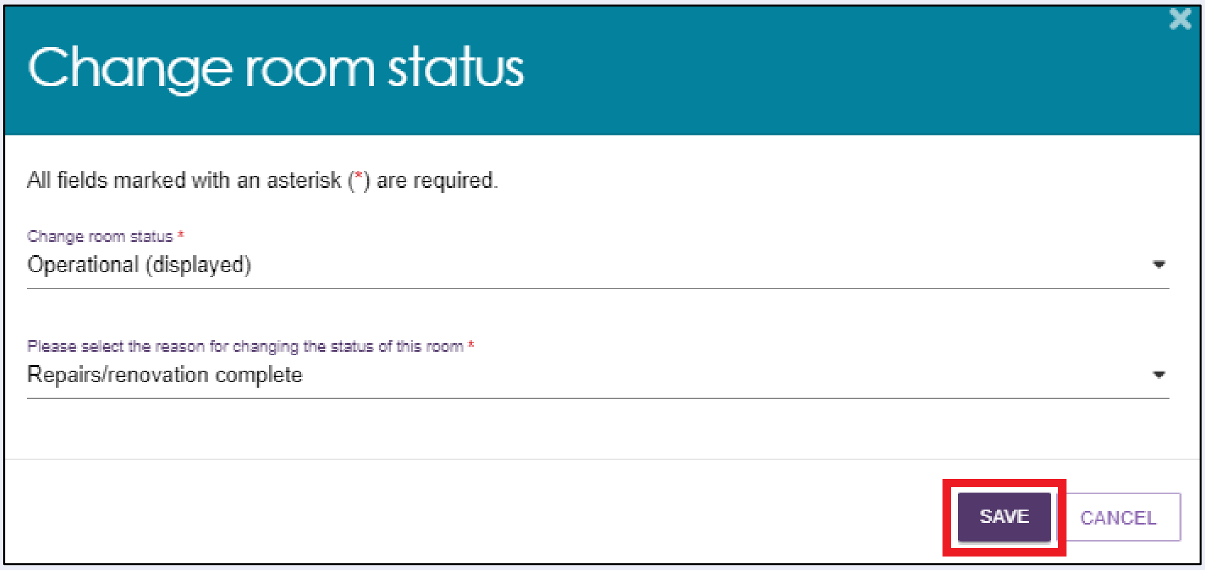
3. A message will appear advising that you have successfully changed the status of the room. The status of the room will now display as **Offline**.



4. If you wish to make an Offline room Operational, click on the **edit** icon (pencil) next to **Status: Offline**.

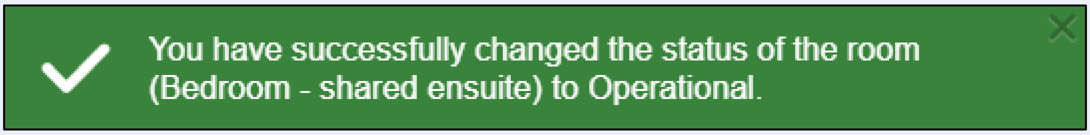


Select **Operational (displayed)** from the change status drop-down menu followed by the reason for the change. Then select **SAVE**.



A green message will appear advising that you have successfully changed the status of the room and the room will show as Operational.

The room will be displayed on My Aged Care within 24 hours.

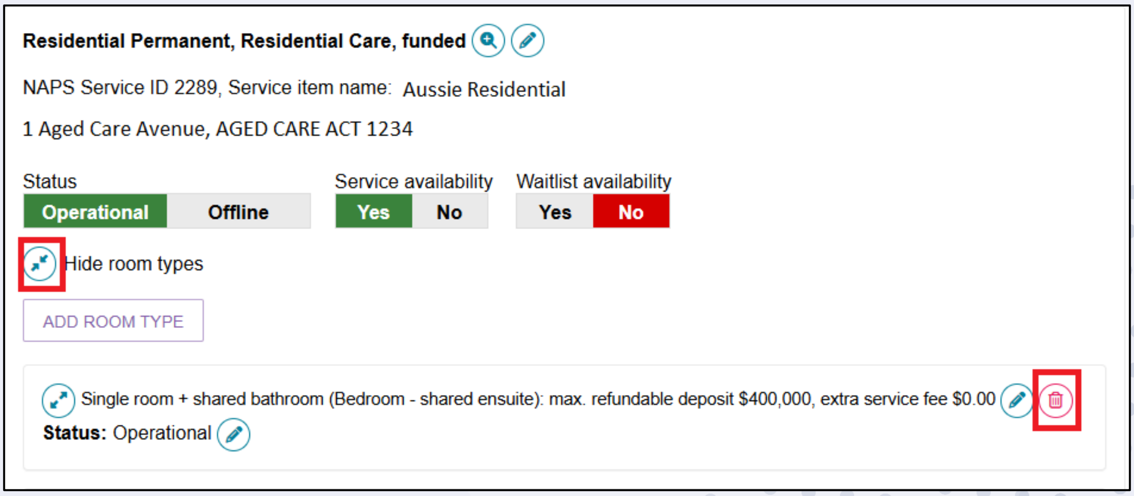


2.2.7.7.4 Delete a room

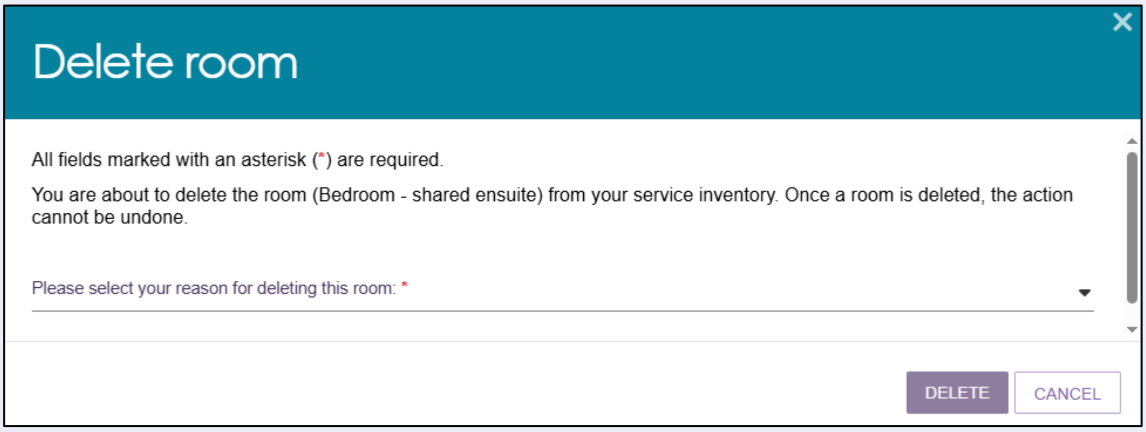
Residential Care providers can choose to permanently delete a room. Note that deletion of a room cannot be reversed.

1. Select the **delete** icon (bin) next to the room you wish to delete.

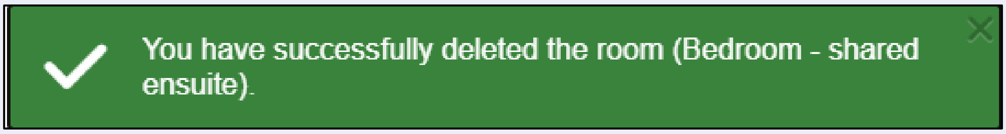
Ensure you select the correct room as the deletion of a room cannot be reversed.



2. From the pop-up, select the reason for deleting the room and select **DELETE**.



A green banner will display at the bottom of screen confirming the room has been successfully deleted.



2.2.8 Transferring service items

! Access to the functionality described in this guide has been disabled in the Service and Support Portal for ALL programs from 1st November 2025 until further notice.

If you require the transfer of services or clients, please contact the My Aged Care Service Provider and Assessor Helpline on 1800 836 799, who will be able to assist you.

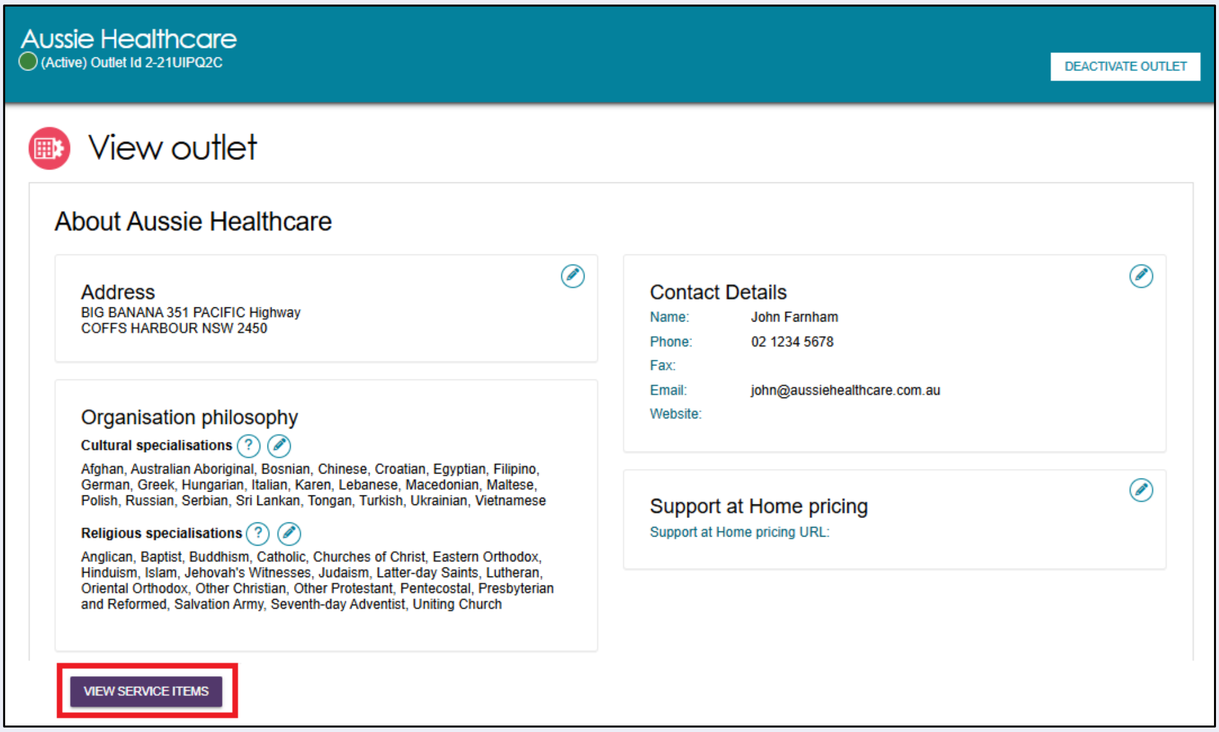
2.2.9 Activating or deactivating a service item

The reasons for deactivating a service item typically include:

- Residential: Facility is no longer accepting residents.
- Commonwealth Home Support Program (CHSP): The service is no longer being delivered in the specified area.
- Support at Home: Selected services are no longer being delivered in the referral area.

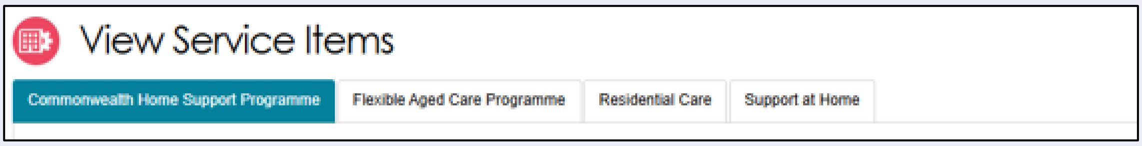
Follow these steps to activate or deactivate a service:

1. Select **Outlet administration** from the homepage, then select the outlet that contains the service items that you want to activate/deactivate, and then select **VIEW SERVICE ITEMS**.



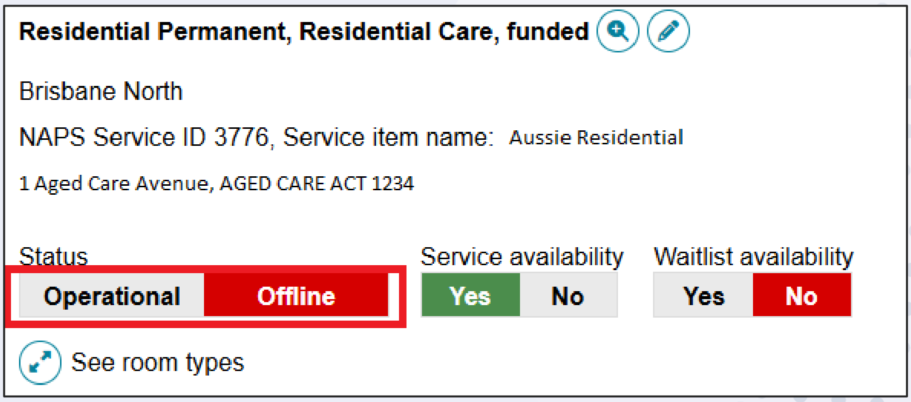
2. Select the appropriate tab corresponding to the program.

! The Residential Care tab should only be selected when working with Residential Care services. If you edit CHSP items, ensure the CHSP tab is selected.

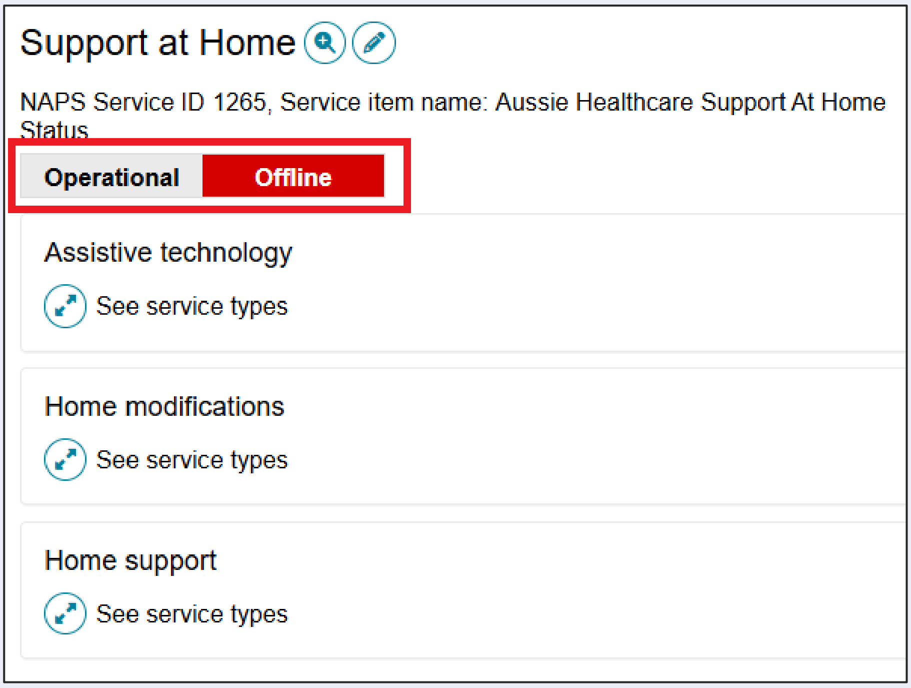


3. For the services that have been added to the outlet, select **Operational** to activate the service item. Alternatively, select **Offline** to deactivate the service item under the **Status** heading.

Only **Operational** services will display in the service finders.



For Support at Home, the Operational or Offline status applies to every service group, service type and service that your outlet is approved for.



! The Offline status has replaced Inactive status and should be used to indicate where a funded service is not currently offered by the provider. For example, the service is at capacity. Services that are Inactive are services that are no longer funded by the Department. **Inactive** services will not be visible in the My Aged Care Service and Support Portal. Please contact the My Aged Care service provider and assessor helpline on 1800 836 799 if you have questions about your **Inactive** services.

2.3 Maintaining service delivery outlets

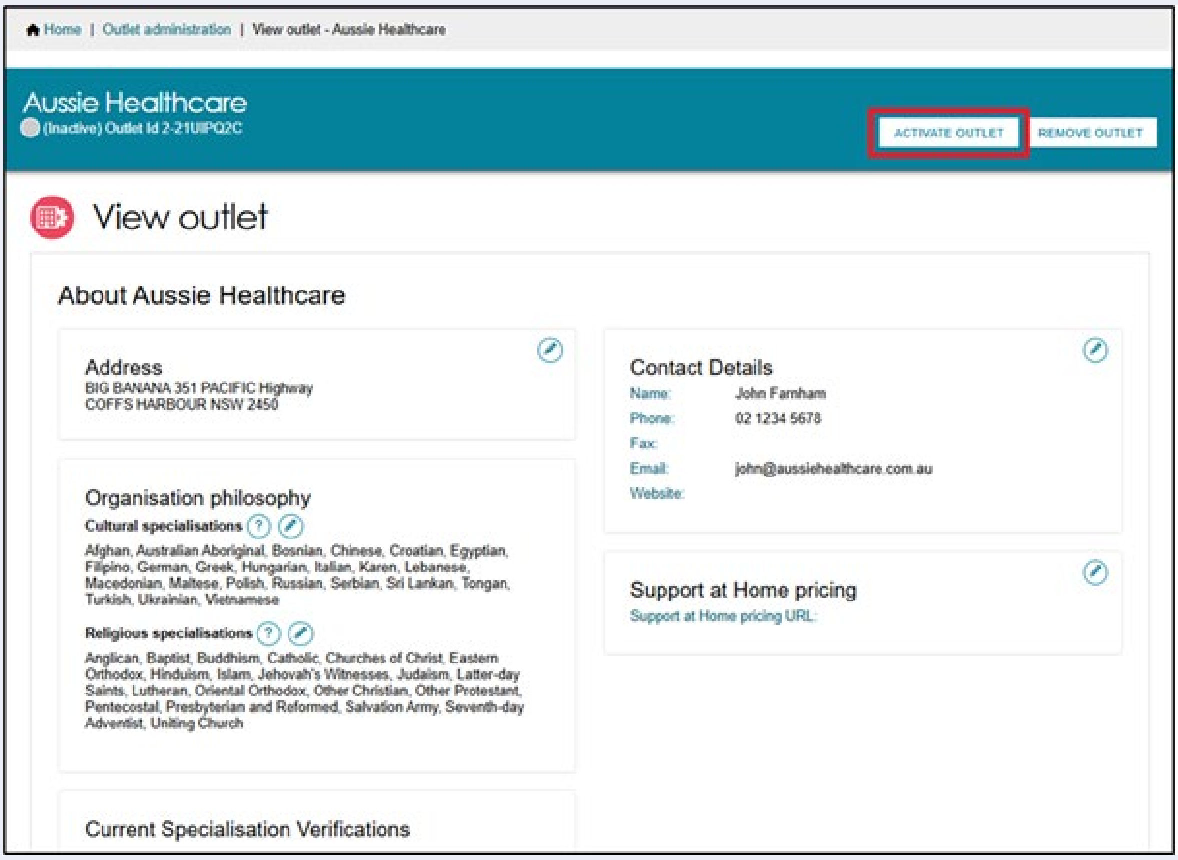
2.3.1 Activating an outlet

After service items are added, outlet(s) need to be made active so that:

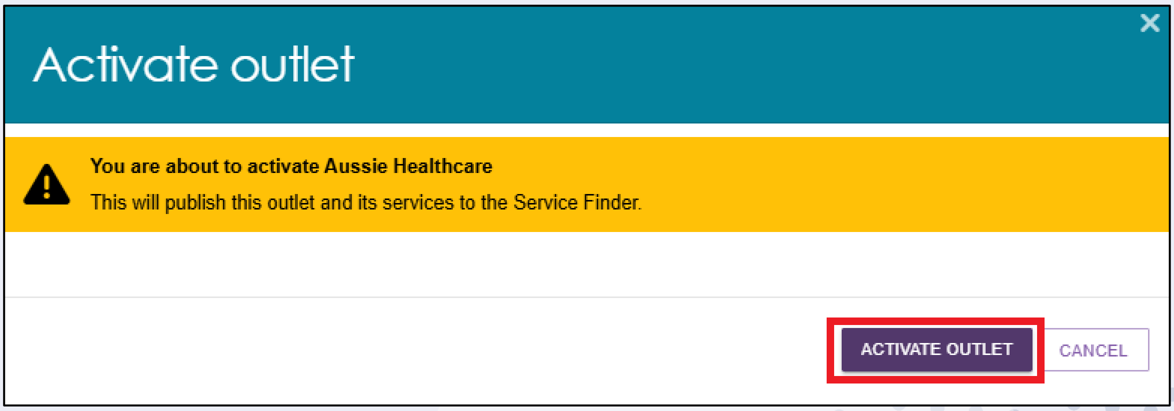
- The service items display in the service finder.
- Contact centre staff and assessors can send electronic referrals to the appropriate outlet.

Follow these steps to activate an outlet:

1. Navigate to the **View Outlet** details from the **Outlet administration** page for the outlet that you want to activate and select **ACTIVATE OUTLET**.



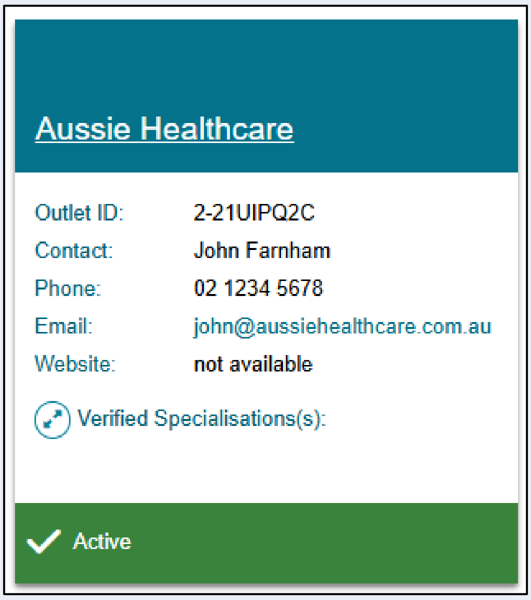
1. Select **ACTIVATE OUTLET** to confirm that you wish for this information to be displayed in the service finder. A warning message will display:



Your outlet is now active and operational service item information will display in the service finder and will display as **Active** in the Service and Support Portal.

Assessors can only match and refer to active services.

Card View



Outlet View

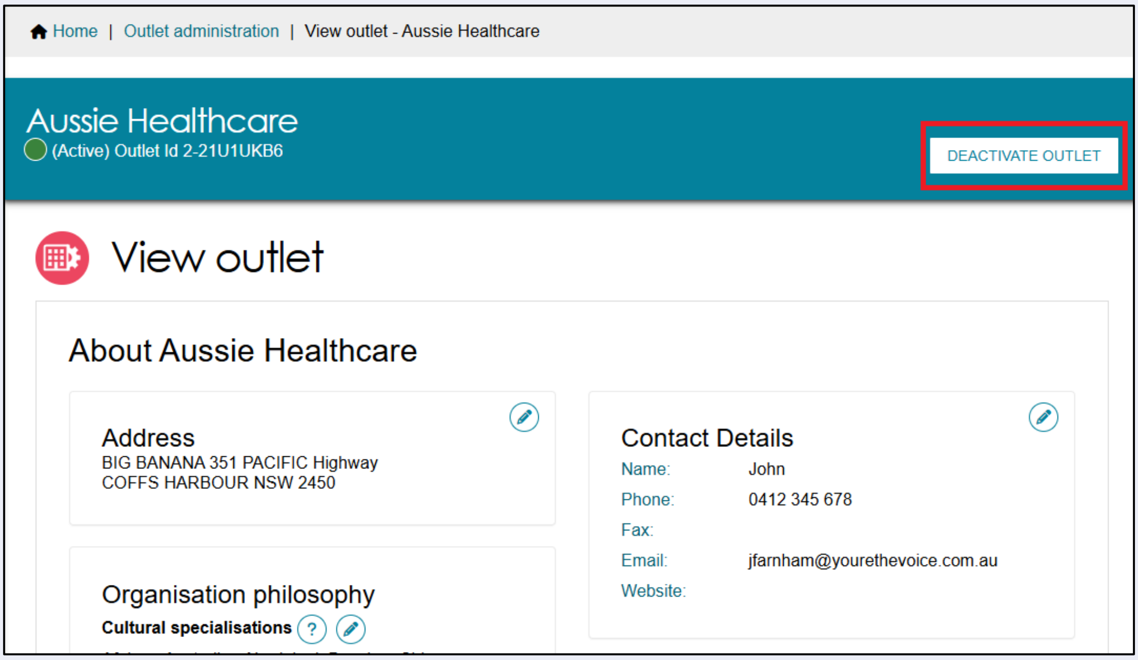
2.3.2 Deactivating an outlet

To remove an outlet from the service finder on the My Aged Care website, and stop referrals being sent to the outlet, it must be deactivated.

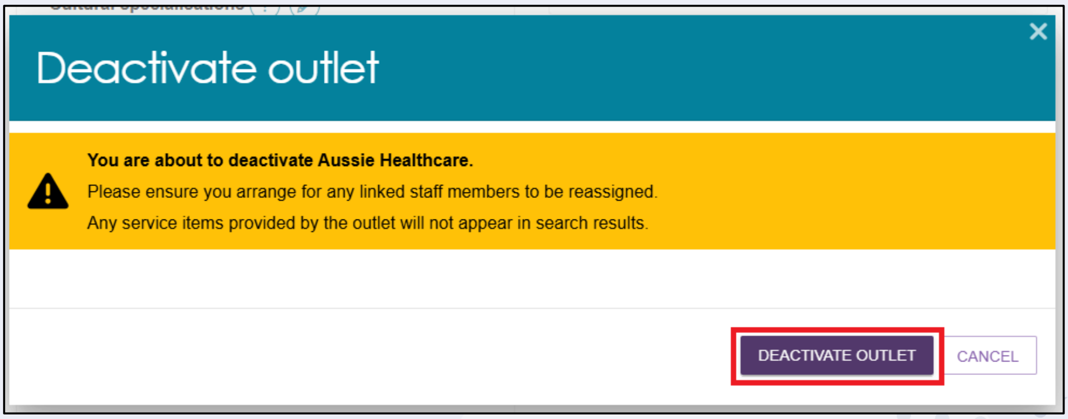
! An outlet cannot be made inactive if there are accepted and commenced services.

Follow these steps to deactivate an outlet:

1. Select **Outlet Administration** from the homepage.
2. Navigate to the **View Outlet** details from the **Outlet administration** page for the outlet that you want to deactivate and select **DEACTIVATE OUTLET.**



3. Select **DEACTIVATE OUTLET** at the pop up to confirm that you wish to deactivate the outlet.



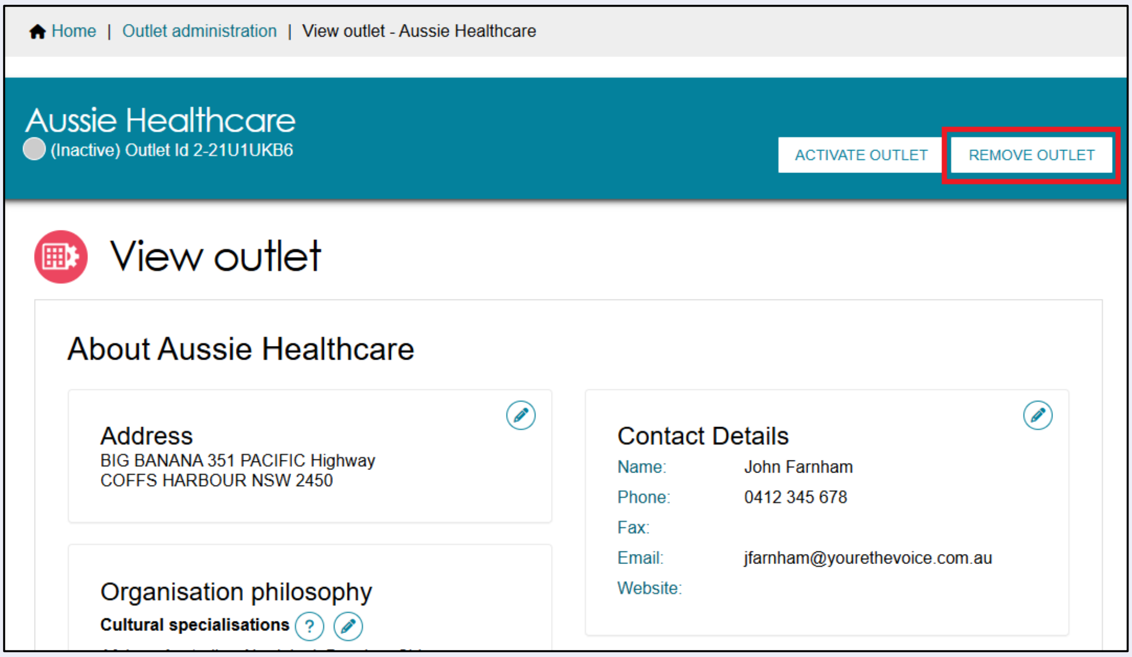
The outlet is now inactive, does not display on the relevant service finder or receive referrals, and displays as **Inactive** in the Service and Support Portal.

2.3.3 Removing an outlet

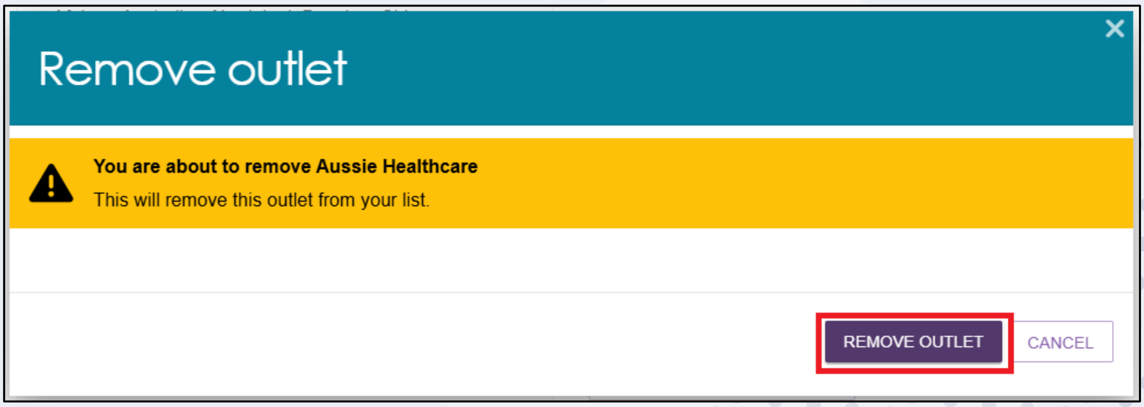
! If you want to create an outlet with the same name as the one you removed, you will need to call the My Aged Care service provider and assessor helpline on 1800 836 799.

To remove an outlet from the Portal, it must be in the status of **Inactive**. Follow these steps to remove an outlet:

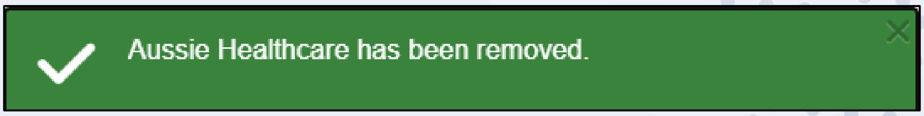
1. Select **Outlet administration** from the homepage.
2. Navigate to the **View Outlet** details from the **Outlet administration** page for the inactive outlet you wish to remove and select **REMOVE OUTLET**.



1. Select **REMOVE OUTLET** to confirm you wish to remove the outlet.



The outlet will no longer display in the Service and Support Portal.

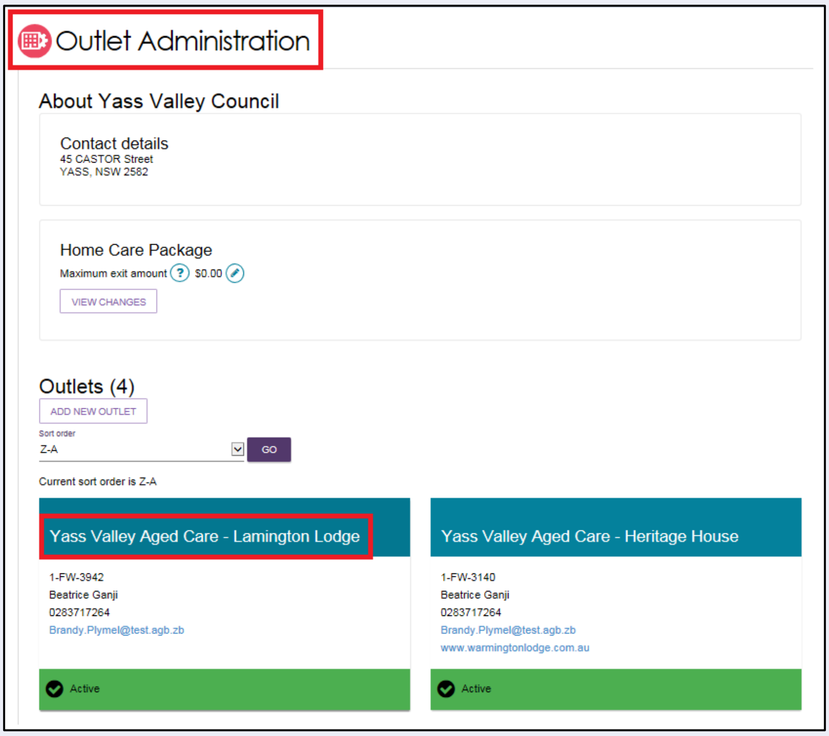


2.3.4 Editing outlet details

Follow these steps to edit an outlet:

! Only non-contractual information can be edited in the Service and Support Portal.

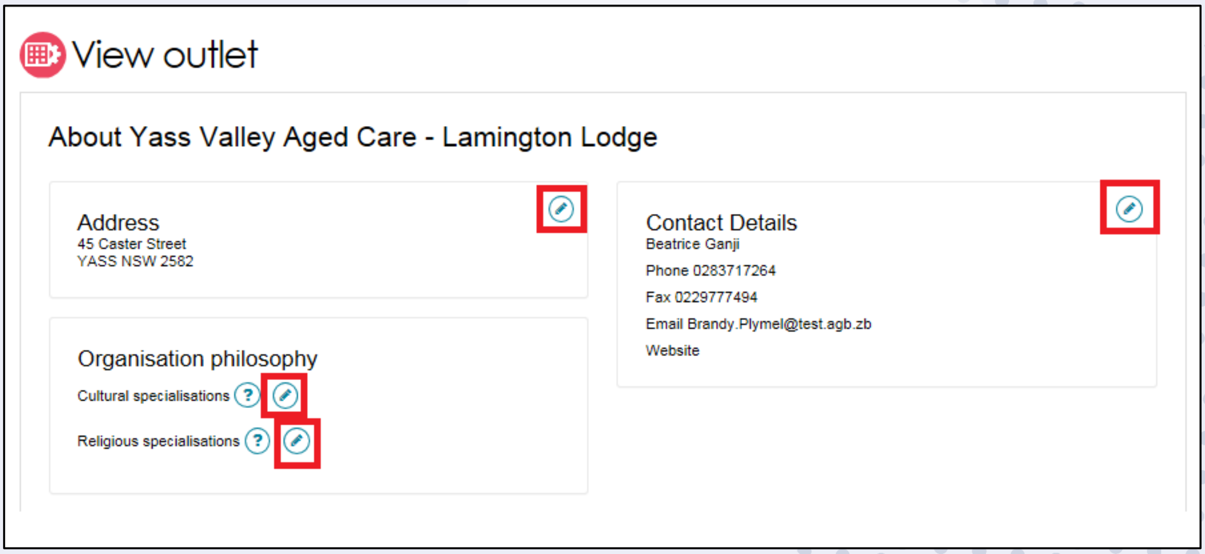
1. Select **Outlet administration** from the homepage.
2. Select the name of the outlet on the **Outlet card** you want to edit.



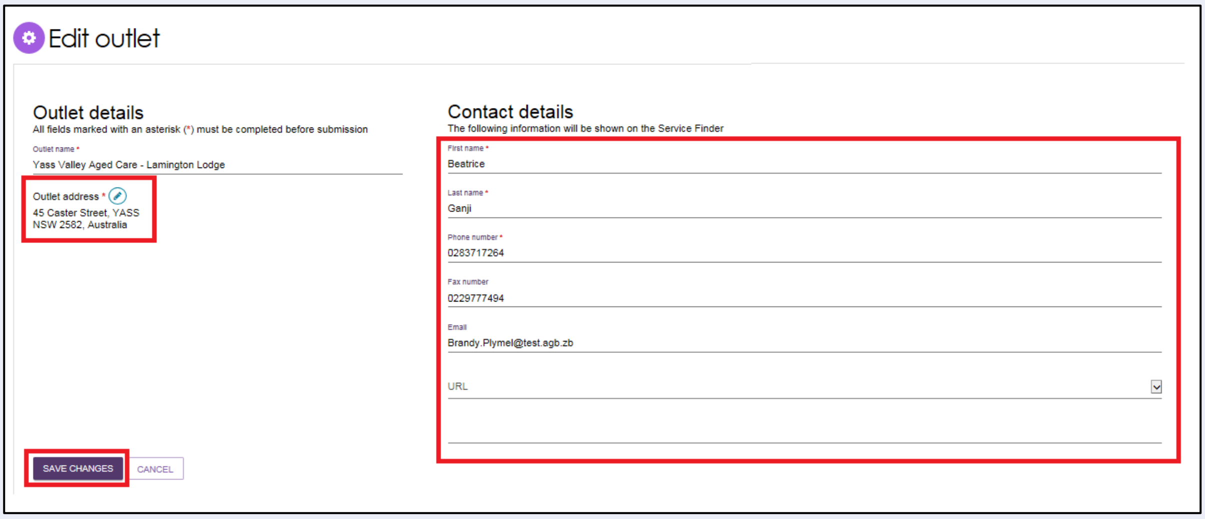
3. On the **View outlet** page, select the area that you would like to edit, **Address**, **Contact** details or **Organisation philosophy**.

You can also change the **Organisation philosophy** when viewing your outlet information.

For more information on Organisation Philosophy refer to Editing the organisation philosophy.



4. Edit information and select **SAVE CHANGES**. To edit address details, select **Edit** next to the outlet address.



2.4 Tasks and notifications

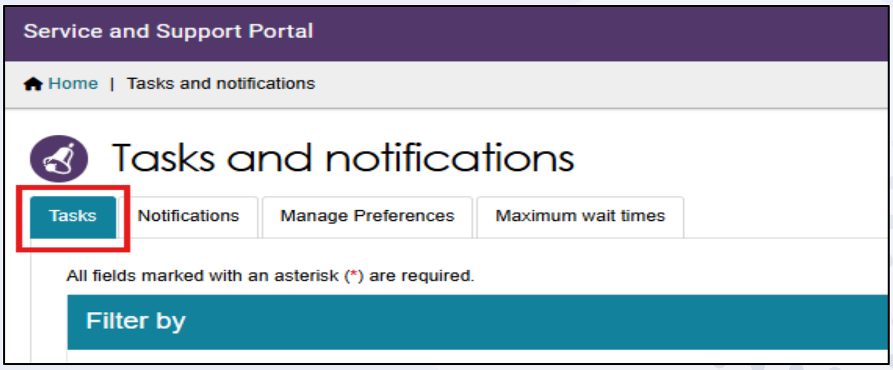
2.4.1 Viewing tasks and notifications

Follow these steps to view tasks and notifications:

! You must log onto the relevant outlet to view its tasks. You can do this by selecting the outlet you wish to log in to next to the **Logout** link at the top right of the portal.

1. Select the **Tasks and notifications** tile from the homepage.

   To view tasks for your organisation, select **Tasks**. Select an outlet to view tasks related to that outlet.



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

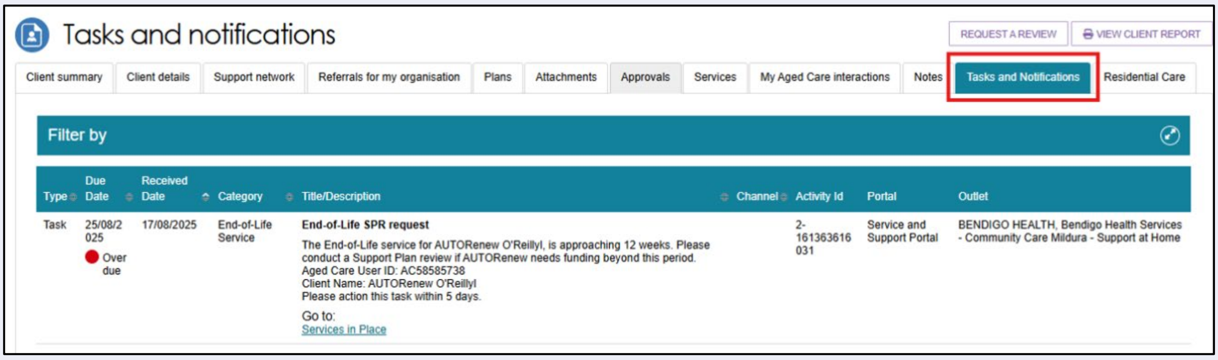
- Due date
- Category
- Title/Description
- Aged Care User ID

- Client name
- Activity ID.

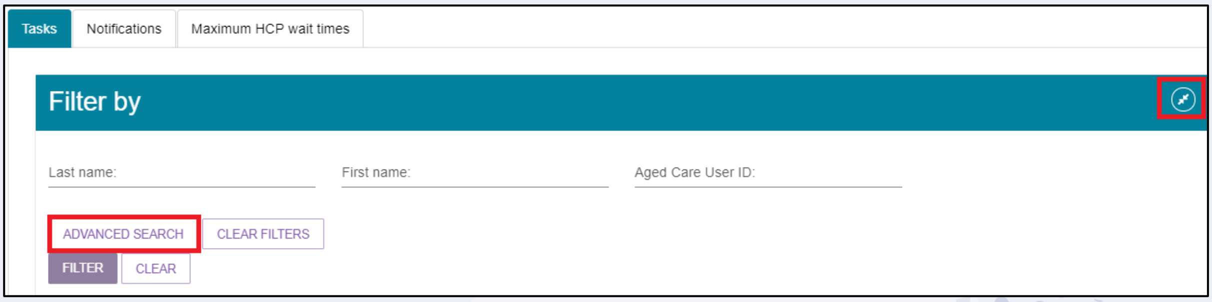
! Tasks that have been marked as important for your outlet by your outlet administrator will be displayed with a visual indicator. The managing preferences section in this guide explains how to set tasks as important.

2. To view notifications for your organisation, select **Notifications**. Select an outlet to view tasks related to that outlet.

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.



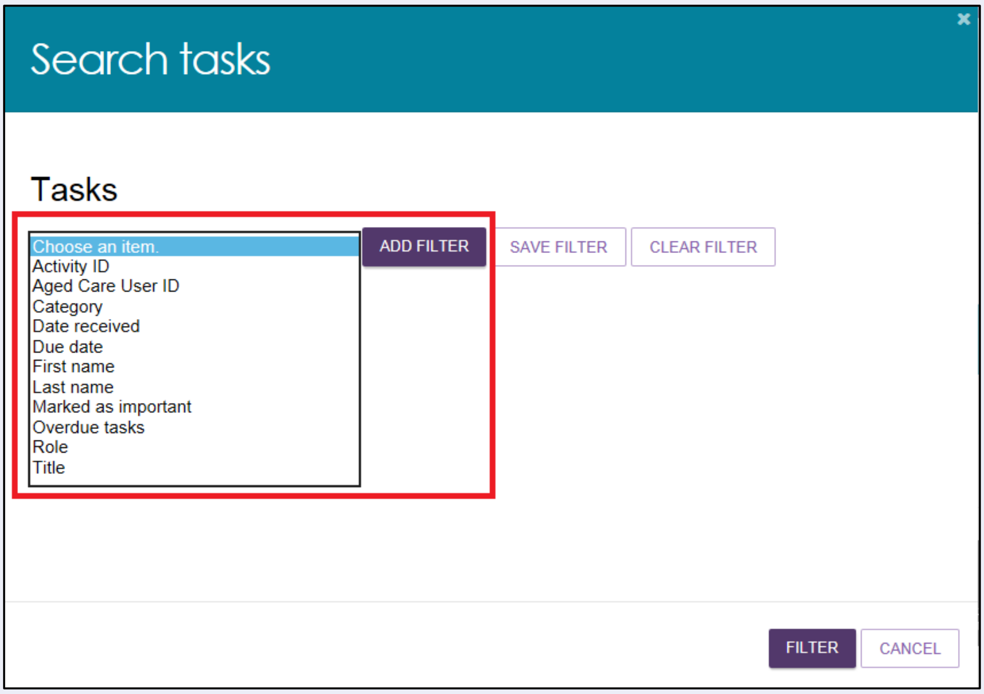
5. You can search for specific tasks using the filter options or using custom filters in Advanced Search. Select the arrows to the right to expand or collapse the filter options.



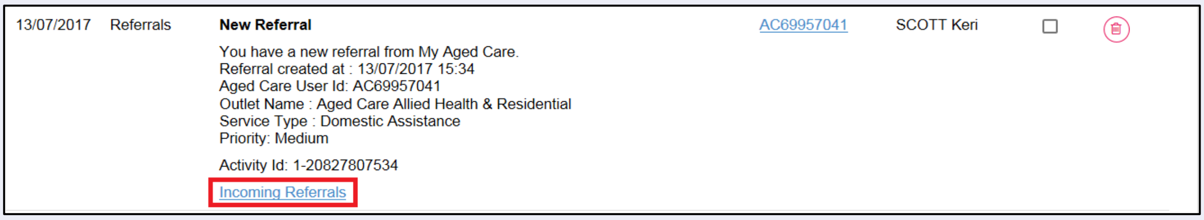
To apply custom filters, select **ADVANCED SEARCH** and choose filters from the drop-down menu and select **ADD FILTER** for each filter you want to apply. The filters include:

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

- Role
- Title.



6. 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 clients record by selecting the client's Aged Care 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.

2.4.2 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:

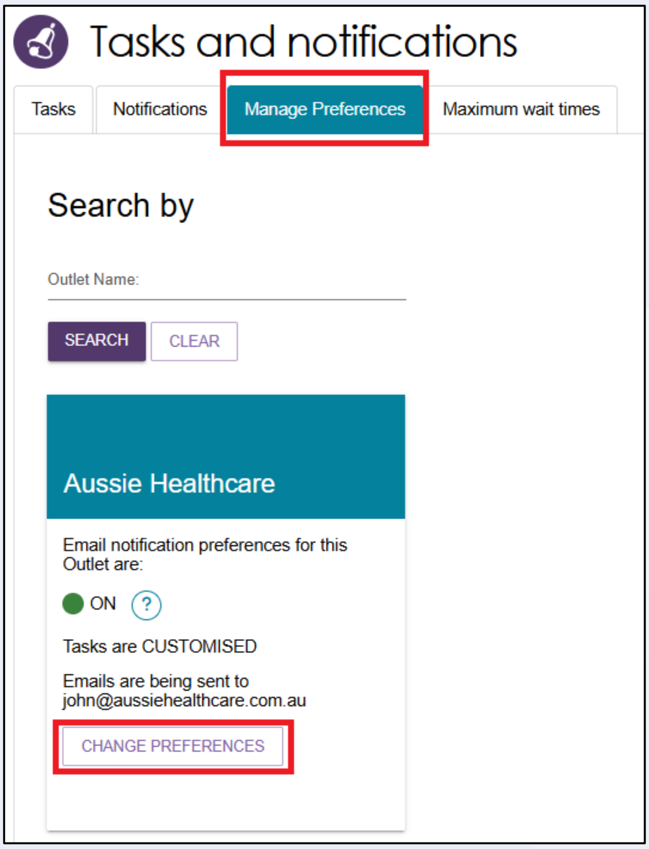
a) Edit email address and email frequency for new task and notifications
b) Turn off visibility of notifications in the Portal
c) View description of each task and notification, including which user types will be able to see them
d) Edit individual task and notification preferences
e) Mark a task or 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. Select the **Tasks and notifications** tile from the homepage.
2. Select the **Manage Preferences** tab.

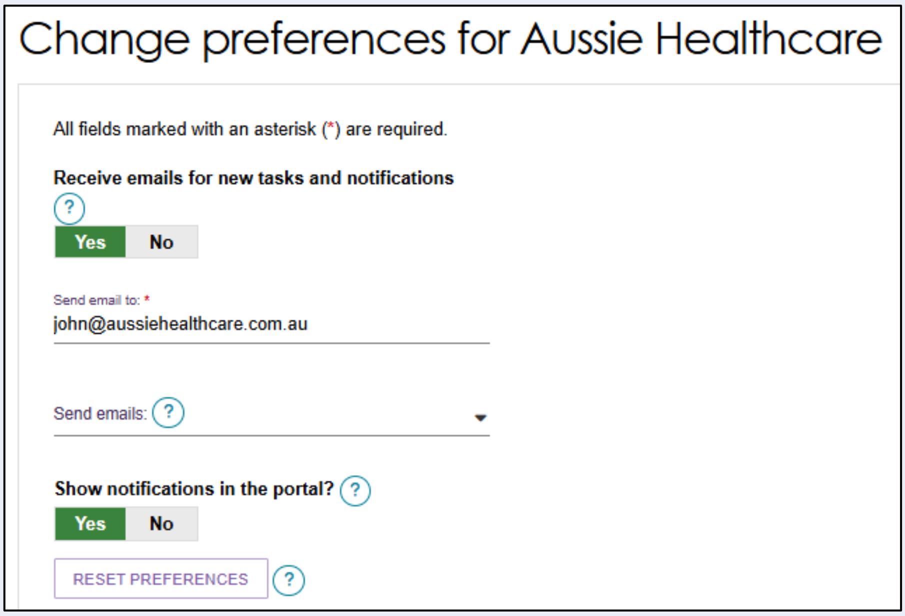
If you are the Organisation Administrator, you will be able to select which outlet you want to configure task and notification preferences for. If you are the Administrator for your outlet, you will only be able to see your outlet's preferences.

Then, select **Change 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.



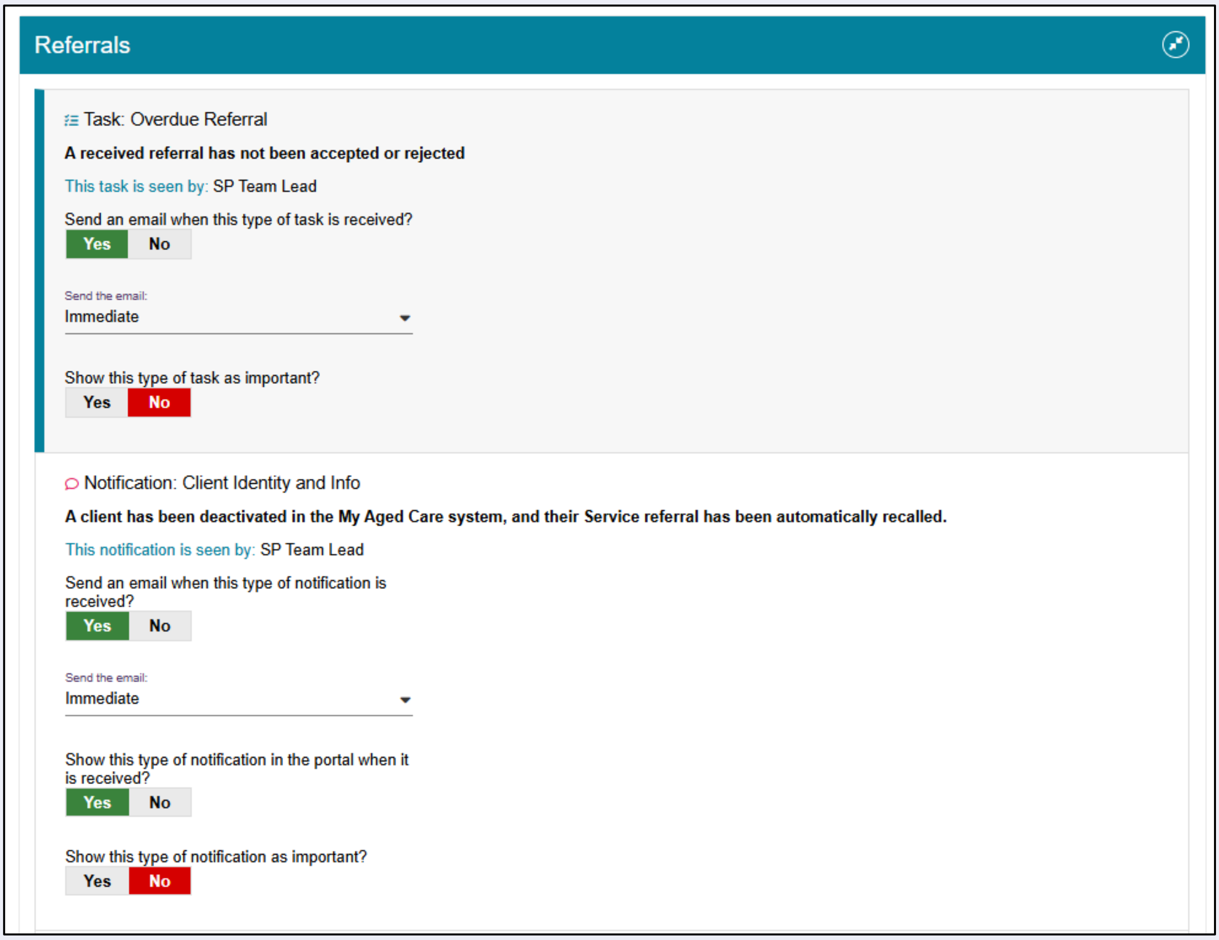
Tasks and notifications are sorted by category. Select the expander icon to expand/collapse each category.

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:

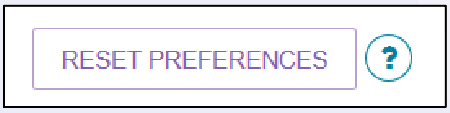
- Whether to send an email when a task or notification generate
- Frequency of email notification, if enabled
- Whether to display a task or notification as important in the portal.



If you choose to mark a task or notification as important, staff within your outlet who can view that particular task or 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 Important	Referrals	**New Referral** 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 Incoming Referrals	AC48007322	JORGENSEN Andy		

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

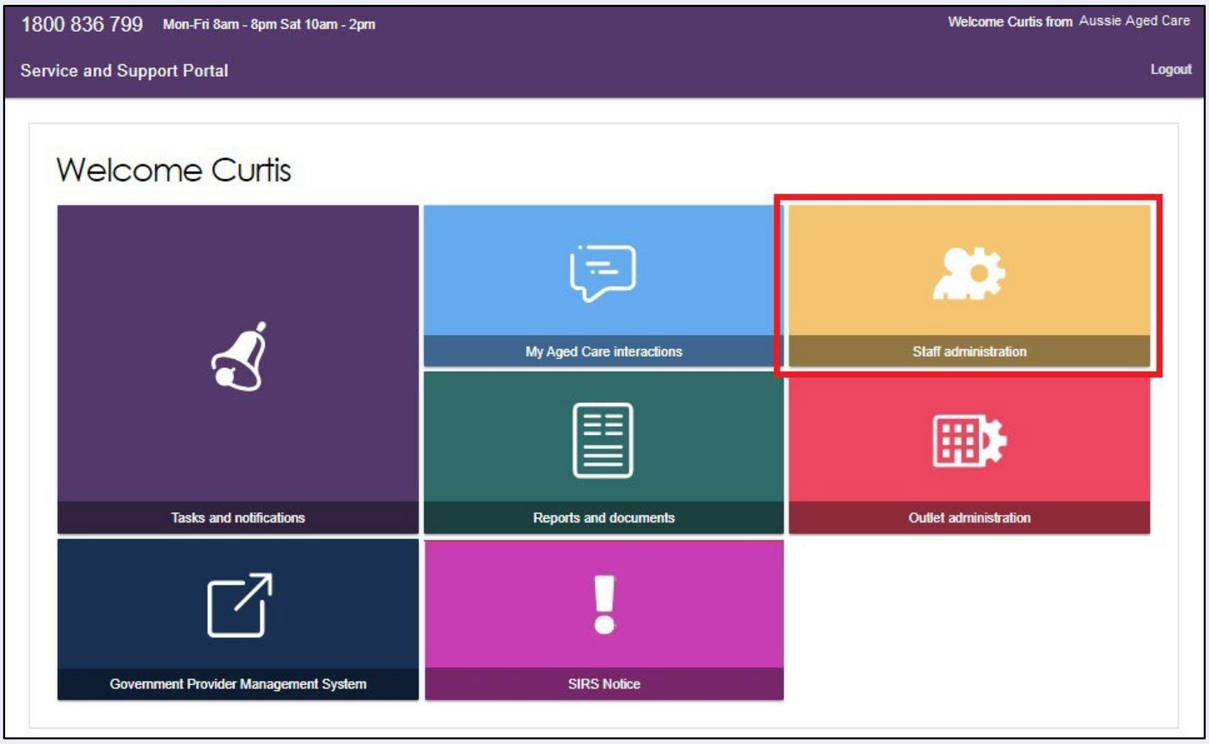


2.5 Creating and maintaining staff accounts

After you have created outlets for your organisation, you can create and maintain staff accounts. For more information about staff roles refer to Staff Roles in the Service and Support Portal.

2.5.1 Viewing staff accounts

By selecting **Staff administration** on the homepage, you can view all current staff that have access to the Service and Support Portal. You can sort staff alphabetically, or by the outlet(s) they are assigned to.



2.5.2 Adding new staff accounts, allocating roles and outlets

After you have created outlets for your organisation you can create staff accounts. You will need to assign roles to your staff and assign your staff to one or more outlets.

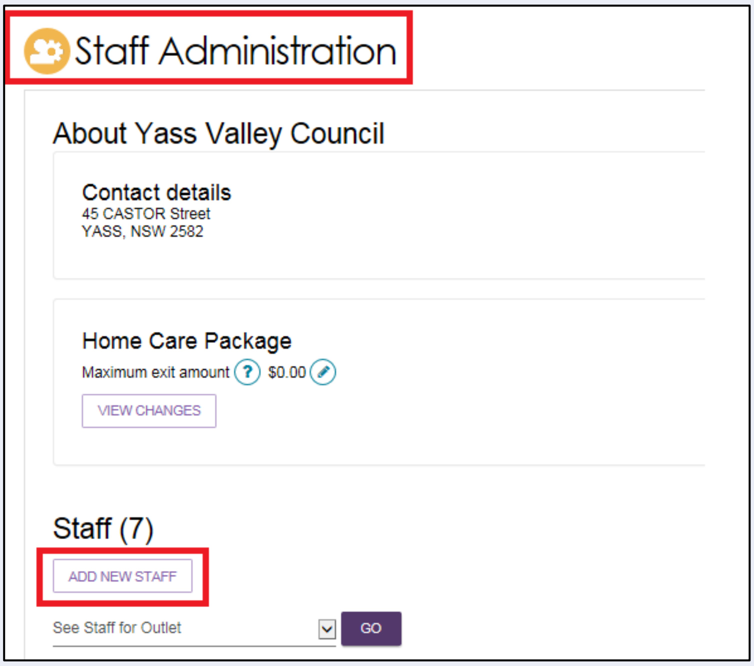
Staff can be assigned one or more roles (Administrator, Team Leader, Staff Member) at the same time within the Portal. Staff roles apply across all outlets to which they are assigned.

! Staff assigned to the Organisation Administrator role can manage all outlets for their organisation.

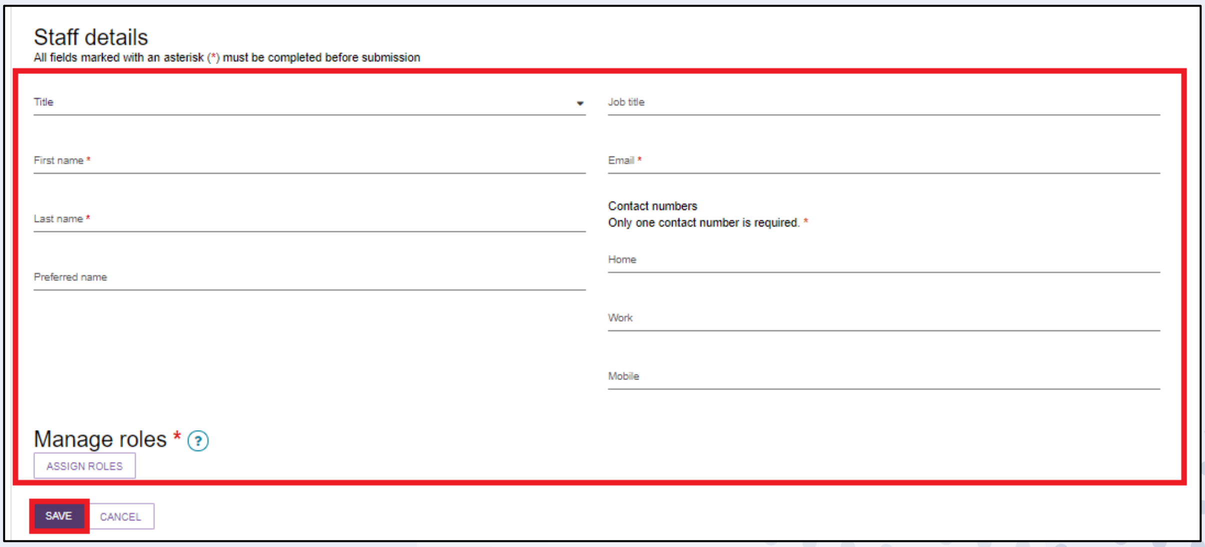
Staff assigned to the Outlet Administrator role for one or more outlets will only be able to manage services and staff for the outlet(s) they have been assigned.

Follow these steps to add a new staff account:

1. Select **Staff Administration** from the homepage.
2. Select **ADD NEW STAFF** from the staff administration page.



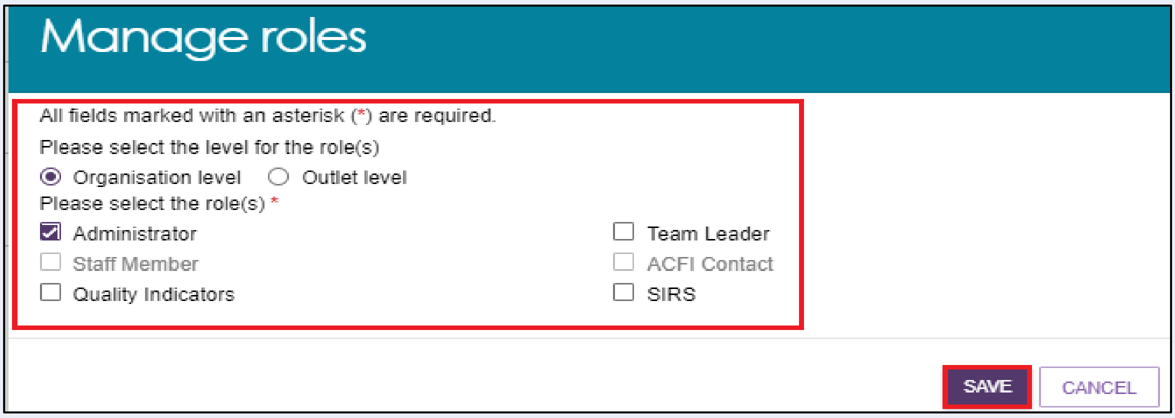
3. You must enter staff details (First name, last name, unique email, and a contact number), assign role(s) to staff, and assign staff to one or more outlets. Next, select **SAVE**.



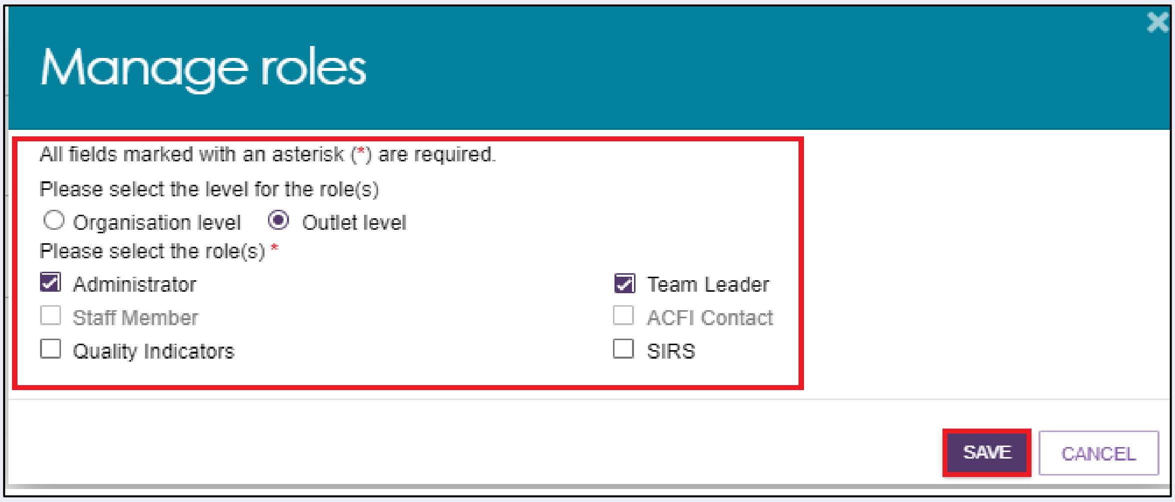
4. You can assign staff to either the Organisation Level or Outlet Level. Organisation Level allows staff to access to the Organisation details, including all outlets for that organisation. Alternatively, you can choose to assign staff to access one, multiple, or all outlets under the Organisation.

Then, select **SAVE** and **SAVE ROLES**.

A PERSON ASSIGNED THE ADMINISTRATOR ROLE AT THE ORGANISATION LEVEL:

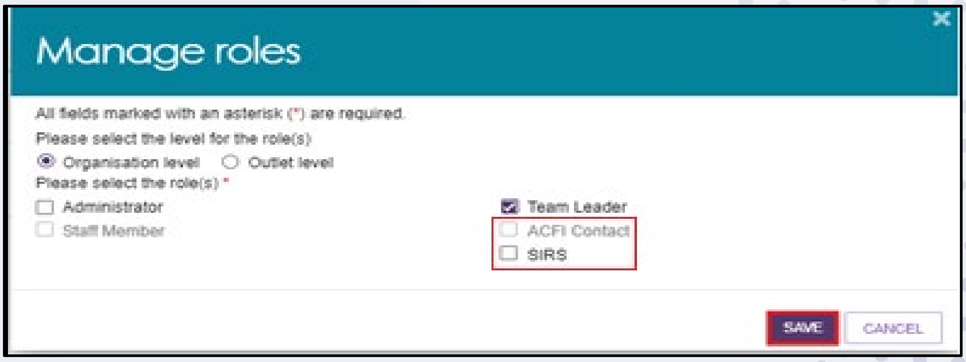


A PERSON ASSIGNED THE ROLES OF ADMINISTRATOR AND TEAM LEADER AT THE OUTLET LEVEL:



CHOOSING AN OUTLET FOR THE ROLE

5. Service Provider Administrators can add staff to additional roles in their outlet.

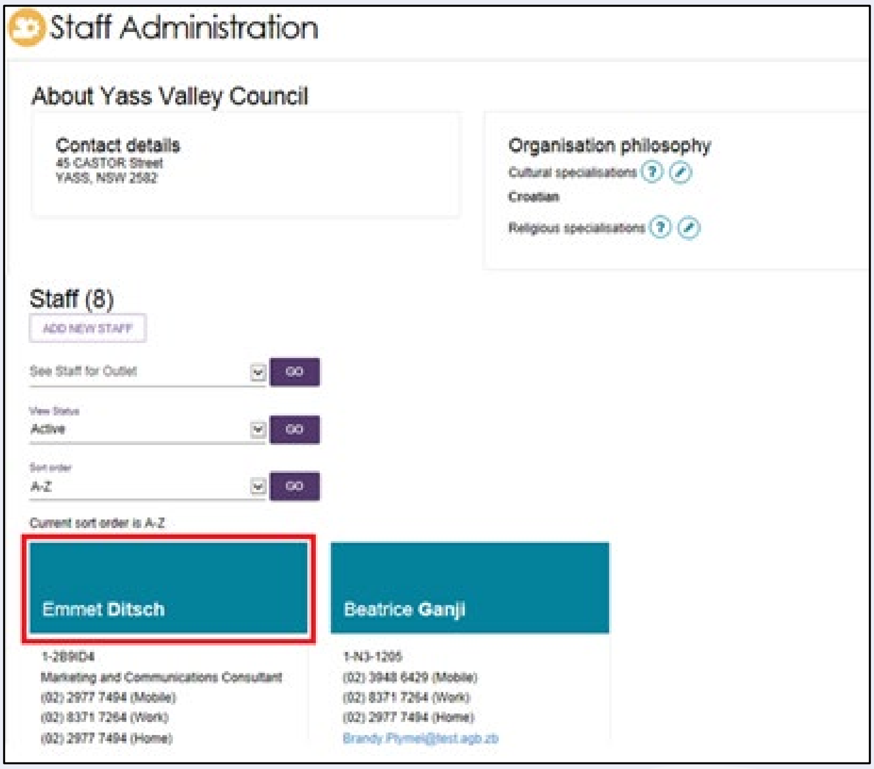


! The first time each staff member logs into the Service and Support Portal, they will need to follow the steps outlined in Logging in to the Aged Care Systems.

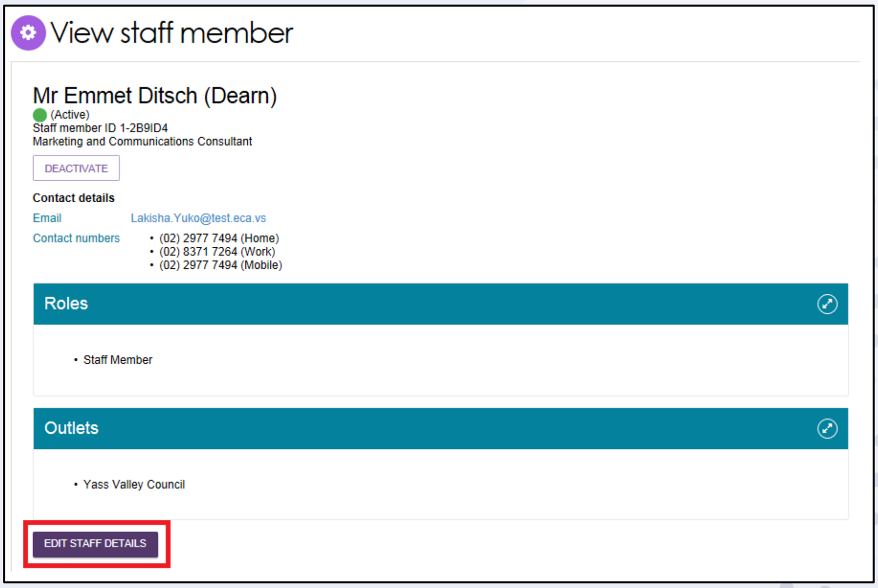
2.5.3 Editing a staff account

Follow these steps to edit a staff account:

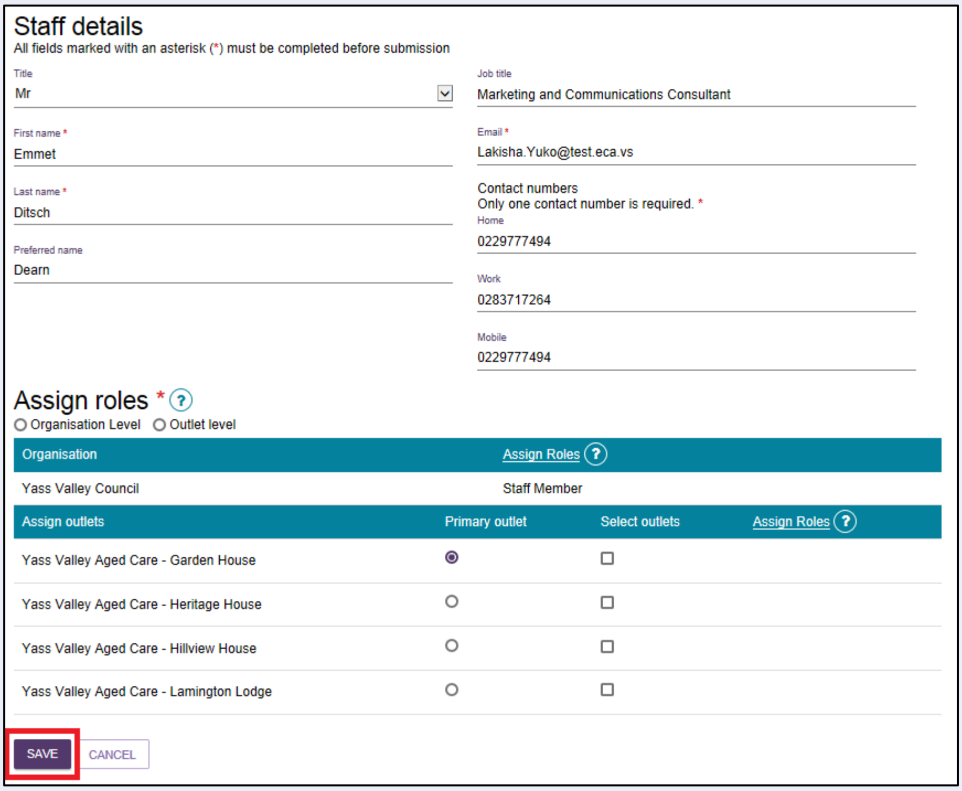
1. Select **Staff administration** from the homepage. Select the name on the **Staff card** that you want to edit.



2. Select **EDIT STAFF DETAILS**.



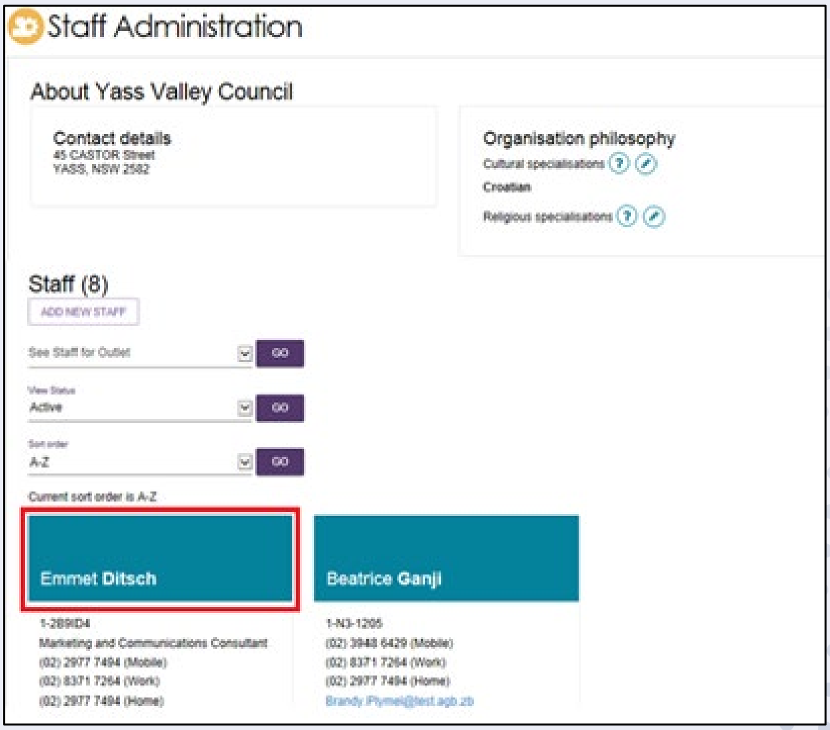
3. Edit staff details and select **SAVE**.



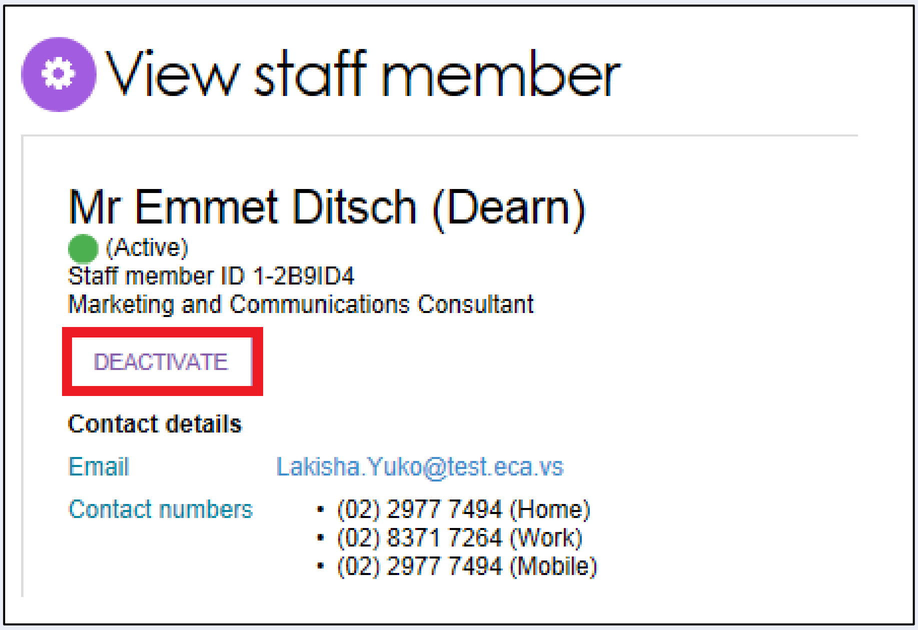
2.5.4 Deactivating staff accounts

Deactivating an account will permanently lock the account for the staff member and remove their access to the Service and Support Portal. Follow these steps to deactivate a staff account:

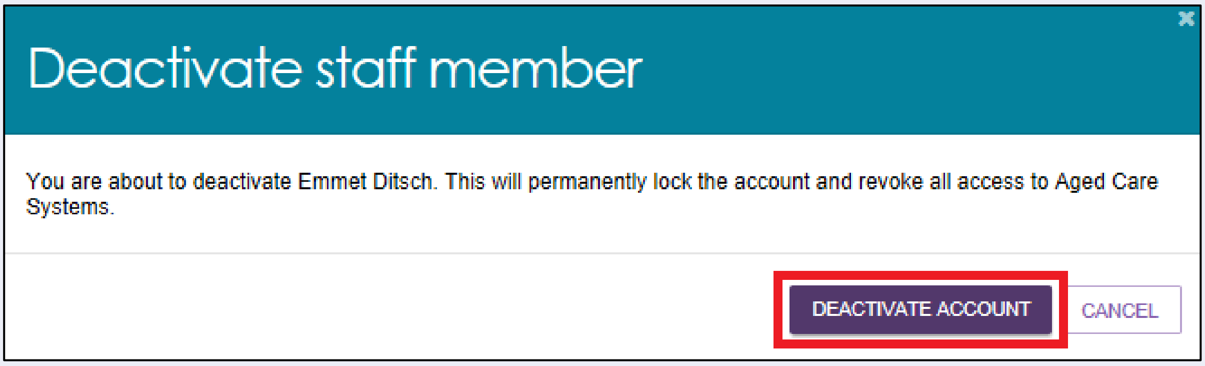
1. Select **Staff administration** from the homepage. From the **Staff Administration page**, select the name of the staff member on the **Staff card** that you want to deactivate.



2. From the **View staff member** page, select **DEACTIVATE**.



3. Select **DEACTIVATE ACCOUNT** to confirm.



The staff member account will now appear as Inactive in the Service and Support Portal.

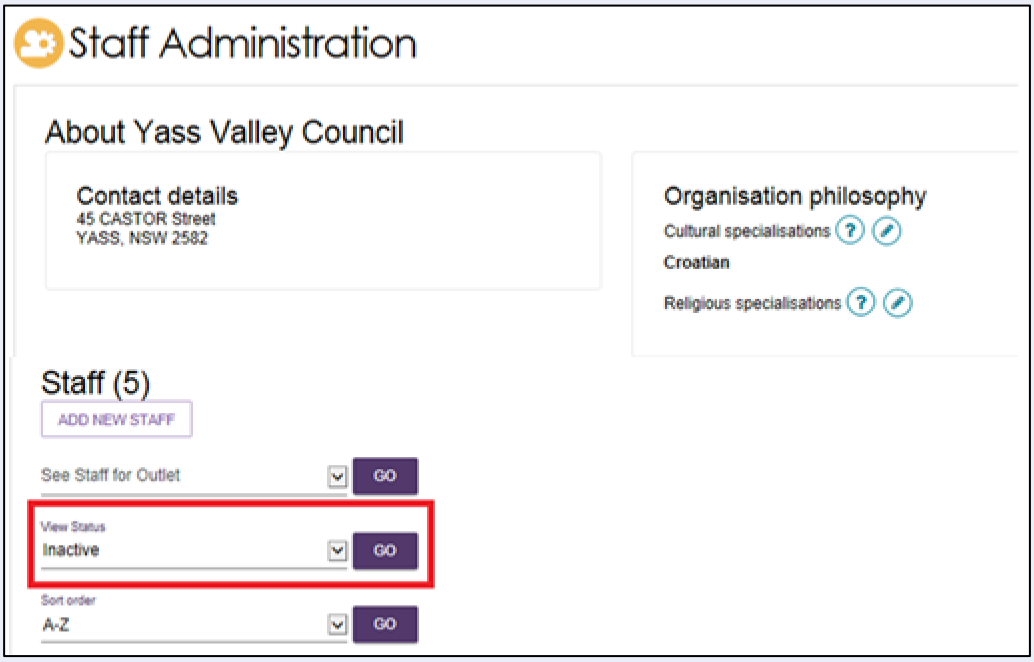
2.5.5 Removing staff accounts

Inactive staff members (that have previously been deactivated) can be removed from organisations and outlets and will no longer display in the Service and Support Portal.

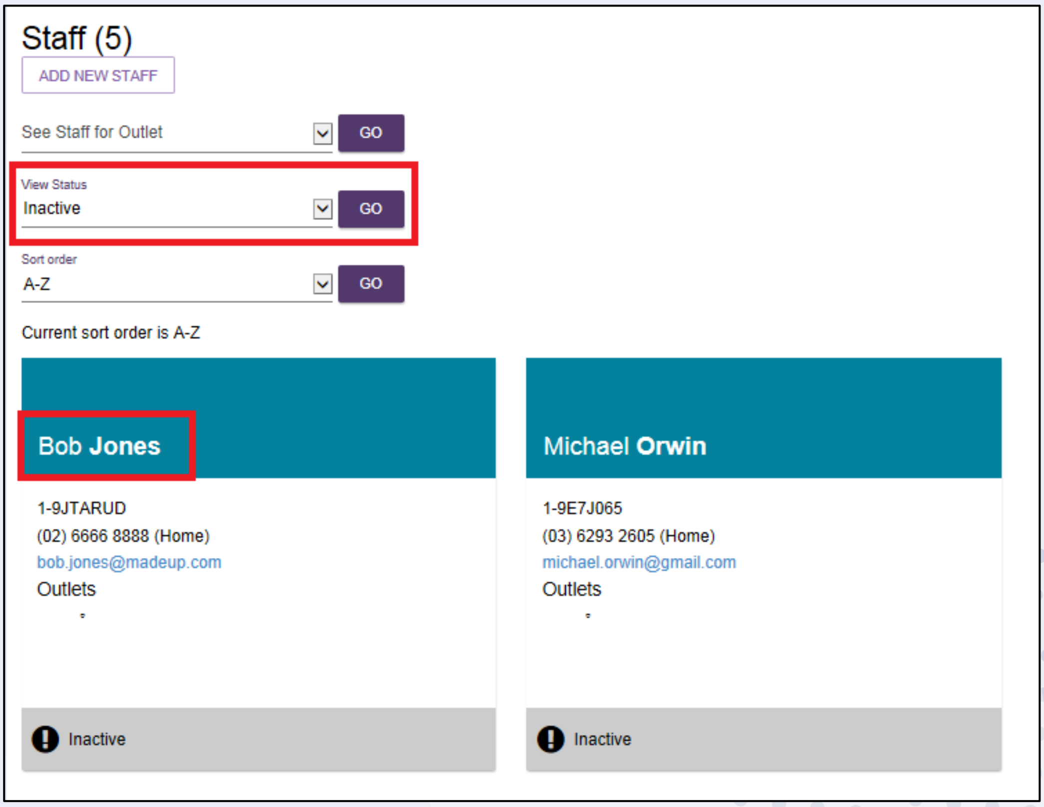
! For information on removing a staff member's authorisations in the Relationship Authorisation Manager (RAM), refer to Managing Authorisations. If you need to restore access for a staff member who has been removed, call the My Aged Care contact centre. You cannot re-create a portal user account using the same email address and myID.

Follow these steps to remove a staff account:

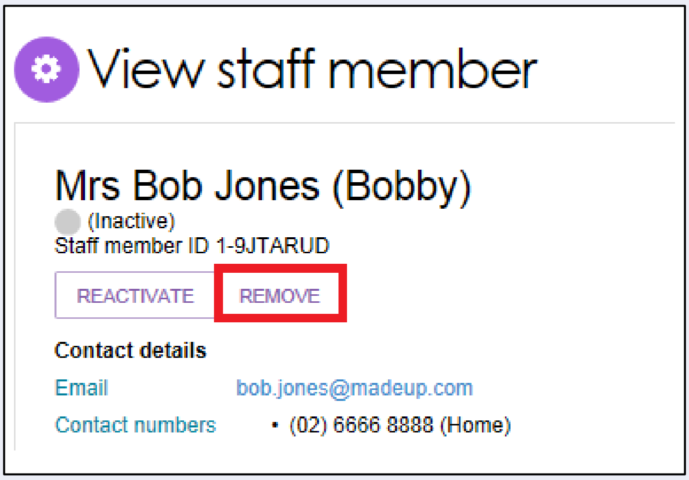
1. Select **Staff administration** from the [homepage](). From the **Staff Administration** page, select **Inactive** from the **View Status** drop down menu to view inactive staff.



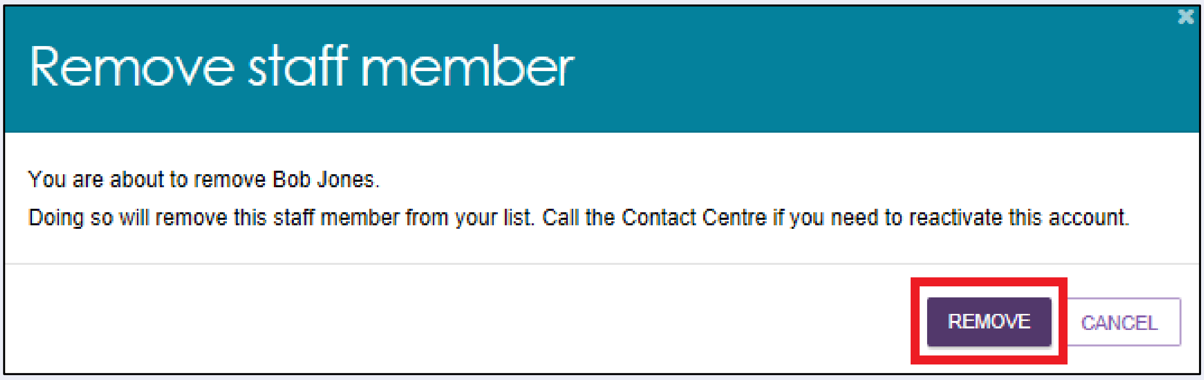
2. Select the name of the staff member on the **Staff card** that you want to deactivate. The **View staff member** page appears.



3. From the **View staff member** page, select **REMOVE**.



4. Select **REMOVE** to remove the staff member from your staff list.



2.6 Generating reports and accessing forms

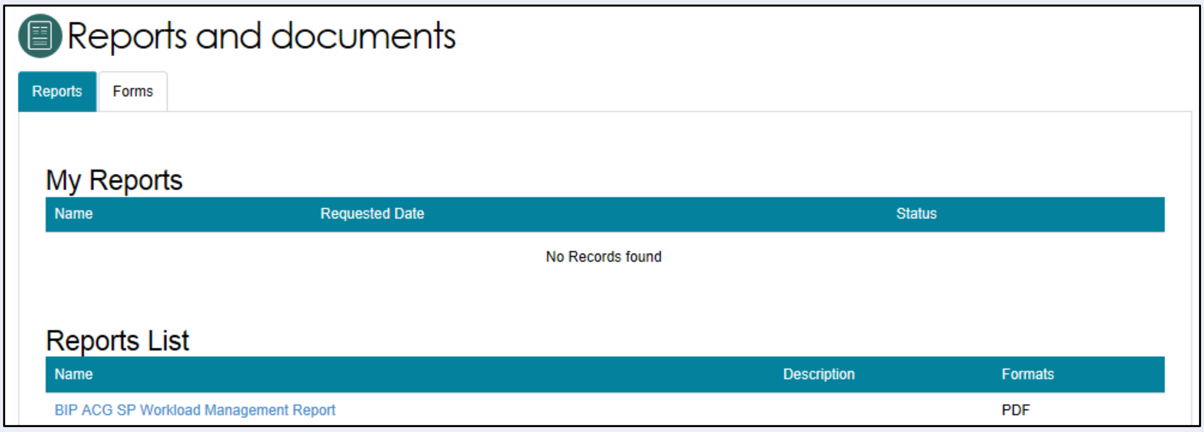
Providers can generate and view reports and access forms via the Service and Support Portal. You will also be able to use the **Reports** feature to print documents.

2.6.1 Generating reports

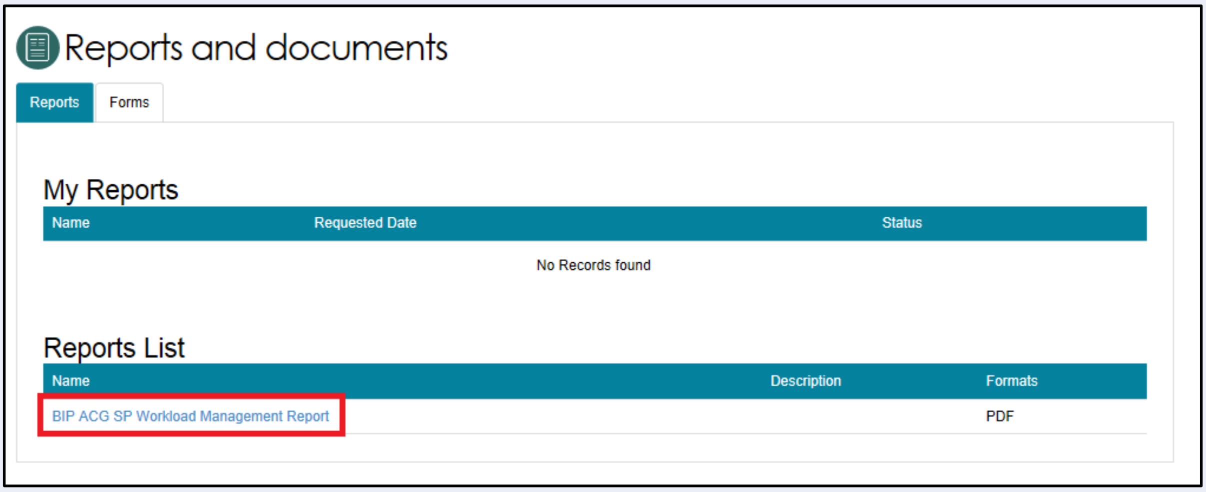
Administrators, Team Leaders, and Staff Members can generate reports. Follow these steps to generate a report:

1. Select **Reports and documents** from the homepage. The **Reports and forms** page will be displayed.
2. The **Reports and forms** page features a **Reports** tab and a **Forms** tab. The reports tab displays a list of Recently Requested Reports and Reports.

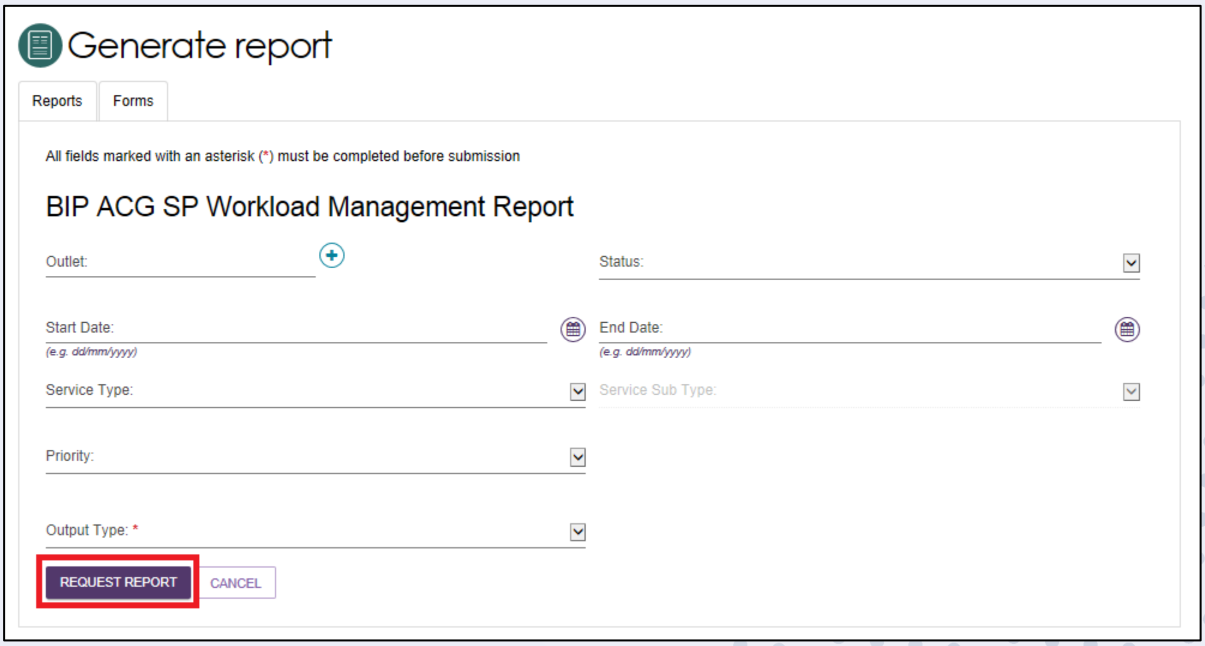
The **Recently Requested Reports** will display client record PDFs that have been generated by the user.



3. To generate a report, select the name of the report in the **Reports List**.



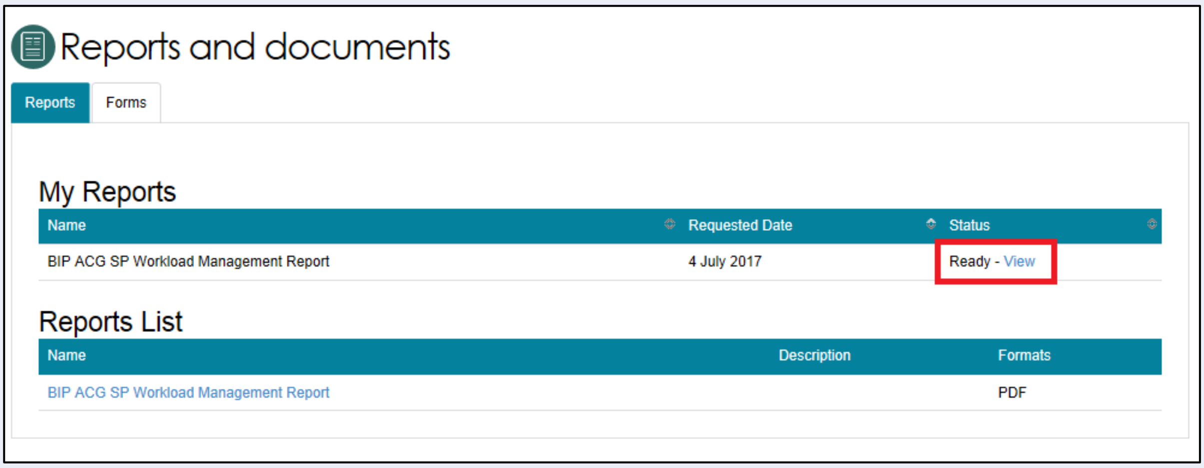
4. Select the Outlet ID, enter a start and end date, and an output type (CSV or PDF), then select **REQUEST REPORT**. If you do not want to generate the report, select **CANCEL**.



2.6.2 Viewing reports

Follow these steps to view reports:

1. Select **Reports and documents** from the homepage. The **Reports and forms** page appears.
2. In the **Recently Requested Reports** list, select **View** beside the report you would like to view.



3. Select the action you want to complete: **Open**, **Save** or **Cancel** the report.

2.6.3 Accessing forms

Follow these steps to access forms:

1. Select **Reports and Documents** from the homepage.
2. Select the **Forms** tab. You can view a list of all available forms here.