

Service and Support Portal User Guide Part 2: Team Leader and Staff Member Functions

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1. Background and overview

1.1 Purpose of the Guide

The My Aged Care Service and Support Portal User Guide - Part 2 (Service and Support Portal User Guide) outlines how Commonwealth-funded registered providers (providers) use the My Aged Care Service and Support Portal for their organisation. This portal is previously known as the My Aged Care Service Provider Portal.

The Service and Support Portal User Guide is split into two parts as follows:

- Part One provides an overview of the portal and describes the functions that an individual with the Administrator role in the Service and Support Portal will perform.
- Part Two (this document) provides an overview of the portal and describes the functions that an individual with the Team Leader or Staff Member role in the Service and Support Portal ('you') will perform.

This guide does not cover:

- Detailed instructions on how to 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 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 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 clients' classifications, reassessments, reconsiderations, and palliative care administration.

2. Accessing the Service and Support Portal

To access the Service and Support portal, each staff member 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](#).

3. Roles in the Service and Support Portal

The person nominated as the My Aged Care Organisation Administrator needs to be the first person from your organisation to log into the Service and Support Portal. How to nominate your first Organisation Administrator is detailed in the [Logging in to the Aged Care Systems](#) guide.

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

CLIENT FOCUSED KEY FUNCTIONS OF THE SERVICE AND SUPPORT PORTAL

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	✓			
View list of residential care recipients and their residential funding classifications			✓	✓
View list of requests for residential funding assessments and reassessment			✓	✓
Request Residential Funding Reassessments			✓	



ORGANISATION FOCUSED KEY FUNCTIONS OF THE SERVICE AND SUPPORT PORTAL

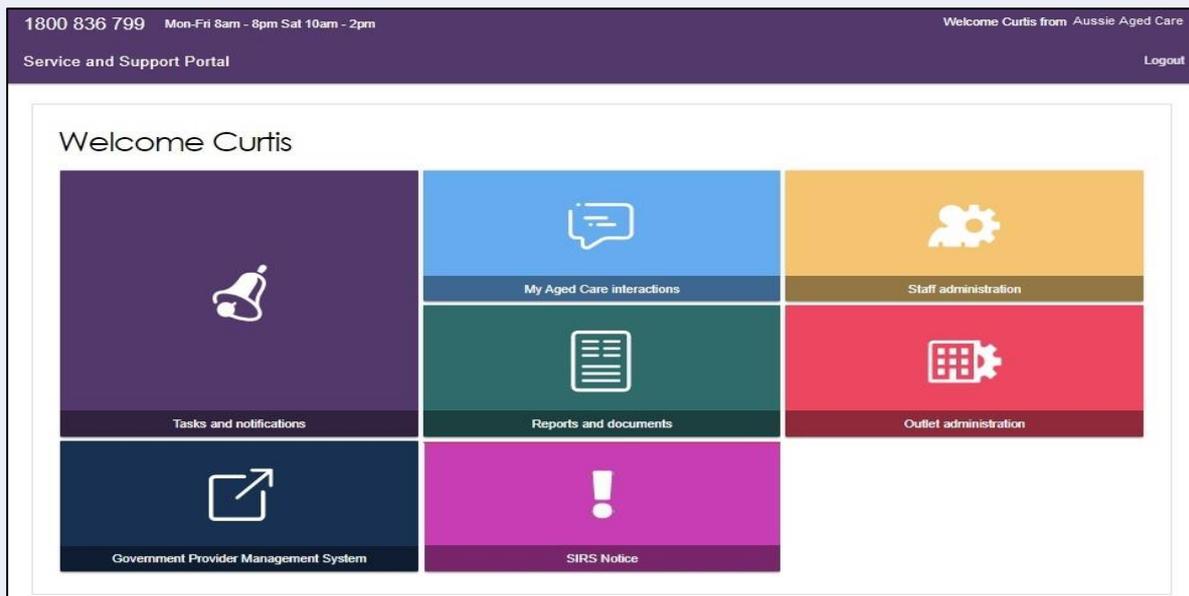
Key Functions	Organisation Administrator	Outlet Administrator	Team Leader	Staff Member
View Palliative Care recipients			✓	✓
Upload Palliative Documentation			✓	✓
Submit notifications under the Serious Incident Response Scheme	✓			
Request change to contractual information		✓		
Add outlets	✓			
Manage outlets: edit, activate, deactivate, remove	✓	✓		
Manage services: add, edit, activate, transfer (organisation administrator only) or deactivate	✓	✓		
Manage staff (organisation level): add, edit, deactivate, remove	✓			
Manage staff (outlet level): add, edit, deactivate, remove	✓	✓		

3.1 Administrator homepage

! Go to [Service and support portal user guide – Part 1: Administrator functions](#) for more information for Administrators.

People assigned an administrator role at an organisation level can view and manage information for the entire organisation in the portal. People assigned an administrator role for one or more outlet(s) in the organisation 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, Tasks and notifications, My Aged Care interactions, Reports and documents, Government Provider Management System, Outlet administration, and Staff administration tiles will appear on your homepage. If you have been assigned the SIRS role by your Organisation Administrator, a SIRS Notice tile will also display.



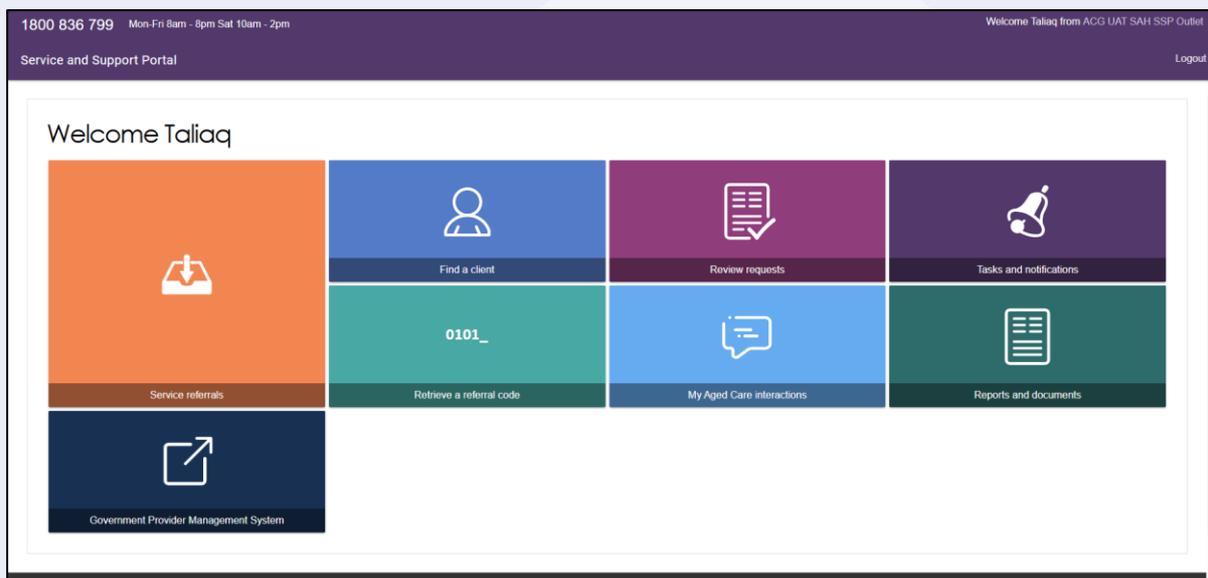
3.2 Team Leader homepage

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

If you log into the Service and Support Portal as a Team Leader, Service referrals, Find a client, Tasks and notifications, My Aged Care interactions, Reports and documents, Retrieve a referral code, Residential Care, and Government Provider Management System tiles will appear on your homepage.

If you have been assigned the SIRS role by your Organisation Administrator, a SIRS Notice tile will also display.

For information on how to add the SIRS application for staff members please refer to the following guide: [Service and Support Portal User Guide - Serious Incident Response Scheme \(SIRS\) Portal](#)

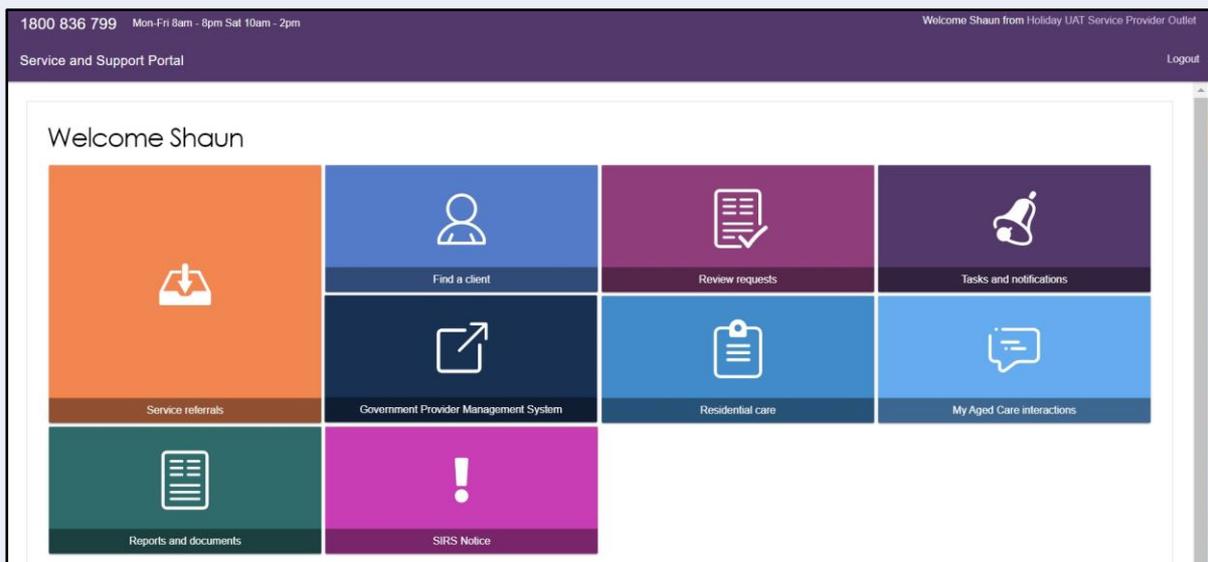


3.3 Staff Member homepage

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.

Your organisation may also give you responsibility for submitting notifications under the Serious Incident Response Scheme (SIRS). As a Staff Member you can also view the clients in your residential facility, their current and historical classifications in the Residential Care tile.

If you log in to the Service and Support Portal as a Staff Member, Service referrals, Find a client, Review requests, Tasks and notifications, My Aged Care interactions, Residential Care, Government Provider Management System and Reports and documents tiles will appear on your homepage. If you have been assigned the SIRS role by your Organisation Administrator, a SIRS Notice tile will also display.



3.4 Homepage for person assigned multiple roles

If you log in to the Service and Support Portal as a user with Administrator, Team Leader, and Staff Member roles, the functions for all these roles will be displayed on the homepage.

4. Managing Referrals

- ! Referrals for service mentioned in this chapter are for Support at Home referrals, which may include multiple service types and services. Providers either receive referrals electronically or via a referral code, depending on the client's preferences, and incoming referrals have a priority status (low, medium, high).

For more information about Residential Funding and Residential Respite referrals, refer to [Residential Client Classifications and Reassessments](#).

Providers may receive referrals for services via four different pathways:

- Clients with existing approvals for care types under the *Aged Care Act 2024* can approach service providers directly (these clients must be registered with My Aged Care).
- Providers can receive electronic referrals for service via the Service and Support Portal.
- Clients can approach providers directly with a referral code issued by assessors or the My Aged Care contact centre.
- Providers can accept electronic referrals for service to a provider's waitlist if a waitlist is available.

Each provider outlet needs at least one person assigned the Team Leader role in the portal. This person will be responsible for managing referrals for service. Below is an outline of the roles assigned.

Roles	Team Leader	Staff Member
View Referral	✓	✓
Accept Referral	✓	X
Accept to Waitlist	✓	X
Reject Referral	✓	X
Revoke Referral after Acceptance	✓	X
Request urgent referral	✓	X
Manage referral notifications	✓	X

4.1 Clients with existing approvals for services under the Aged Care Act 2024

All clients with valid approvals must be registered within the My Aged Care system.

If it is established that the client must be registered and already has an approval, providers should facilitate a review or reassessment of the client's care needs by calling the My Aged Care contact centre or via the online web referral form available on the My Aged Care website at <https://www.myagedcare.gov.au/make-a-referral>.

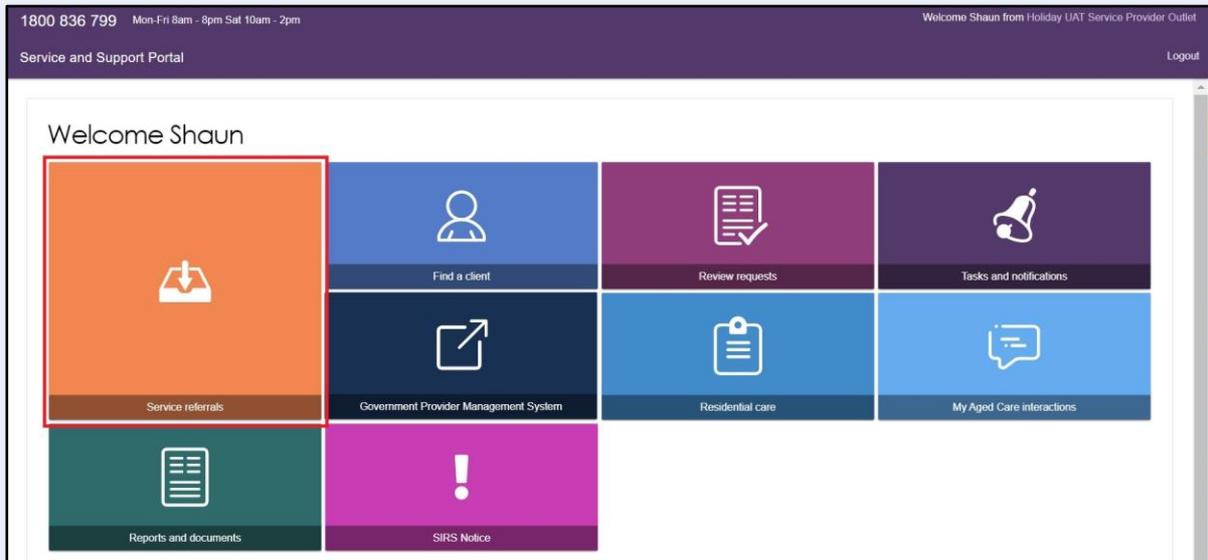
4.2 Electronic referrals for service

Providers can receive electronic referrals for service for clients registered with My Aged Care via the Service and Support Portal.



4.2.1 Viewing referrals

1. Select **Service referrals** from the homepage.

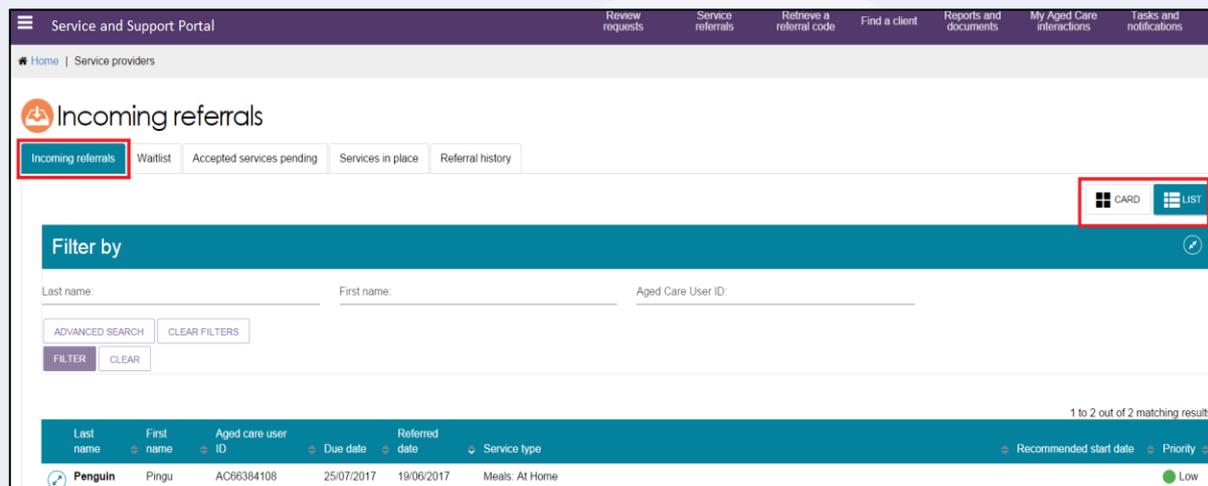


Alternatively, from any other page in the Service and Support Portal, you can choose the **Service referrals** option from the tool bar displayed at the top of the portal.



You will need to select the relevant outlet name to ensure that you are looking for referrals in the correct outlet. This can be done by selecting the outlet name from the top right corner of the portal, above **Logout**.

2. The **Incoming referrals** page will now display a list of incoming referrals (those that have not been actioned). You can alternate between card and list view by using the toggle at the top of the page.



You can refine the search results by entering a client's First name, Last name, or Aged Care User ID. Display the filter option by selecting the expanding arrows at the right of the filter bar.





Incoming referrals

You have report(s) that are ready to be downloaded. To download, go to Reports page.

Incoming referrals

Waitlist

Accepted services pending

Services in place

Referral history



CARD



LIST

Filter by



Last name:

First name:

Aged Care User ID:

ADVANCED SEARCH

CLEAR FILTERS

FILTER

CLEAR

Select the **ADVANCED SEARCH** button to set filter options.

Search incoming referrals

Incoming referrals

Choose an item.

Aged Care User ID
Due date
First name
Last name
Locality
Outlet
Postcode
Priority
Recommended start date
Referred date
Service type
State
Suburb

ADD FILTER

SAVE FILTER

CLEAR FILTER

FILTER

CANCEL

The following search filters can be chosen from the **Optional Filter Field** drop down menu and applied to your search by selecting **ADD FILTER**.

- Aged Care User ID
- Due date
- First name
- Last name
- Locality
- Outlet
- Postcode
- Priority
- Recommended start date
- Referred date
- Service type
- State
- Suburb.



Search incoming referrals

Incoming referrals

Choose an item.

3 of 7 filters used

Locality:

Recommended start date
 from: to:

Service type:

You can save any filters that have been applied by selecting **SAVE FILTER**, so that they may be quickly used again through the **ADVANCED SEARCH** option. Alternatively, these referrals can also be sorted by the following fields, in either ascending/descending or alphabetically:

- Client Last Name
- Client First Name
- Aged Care User ID
- Suburb
- State
- Postcode
- Locality
- Date Referred
- Due Date
- Recommended Start Date
- Priority
- Service Type.

Filter by

Last name: First name:

Sort Referrals by: in order of

Current sort order is Date Referred

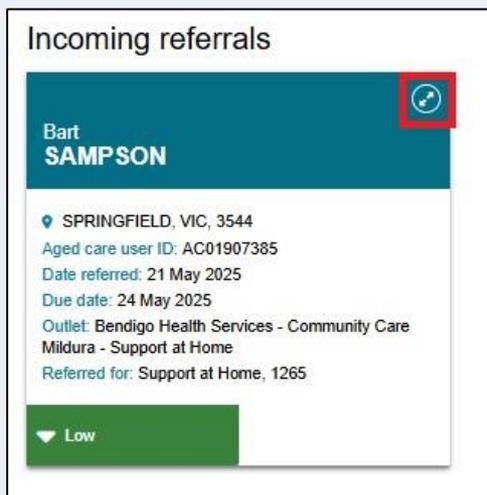
4.2.2 Accepting or rejecting a referral for service

To accept a referral for service, select **Service referrals** from the home page, the toolbar at the top of the portal, or the sidebar from the Menu option at the top left of the portal and follow the procedure below.

For Support at Home services, once funding has been assigned, providers can view the provision of a referral code to the client. Providers should note the take up deadline by which they must have commenced services with a client, or else funding will be withdrawn.

! Referrals for waitlists are not sent as a specific waitlist referral. If a waitlist is available for the referred service, staff or team leaders can accept referral to the waitlist, depending on permissions.

1. From the **Incoming referrals** tab in **Service referrals** select the expanding arrows at the top right of the referral in card view, or to the left of the referral in list view, that you wish to view to display information about the referral.



Or in list view, select the expanding arrows to the left.



2. The expanded information will provide, in addition to what was already visible, any referral comments made by the assessor or contact centre, and whether the client has multiple referrals for additional service types to your outlet.

You may decide to accept, reject, or waitlist referrals based on the information available on the referral card. However, if you want to view more client information prior to accepting a referral, select **VIEW REFERRAL SUMMARY AND CLIENT RECORD** to view details of the referral, the client's assessment and assessment outcomes and more detailed information about the client.



The below screenshot shows the detailed referral view of a Support At Home service, including the place assigned information (i.e. MSO / FSO) for both SaH and AT / HM. Where there are two active classifications in the same Service Group, then details for both classifications will be presented.

The screenshot below shows the alternate list view of the card view presented above.

! For Support at Home services, the detailed referral view will display the recommended frequency and intensity. This information is a recommendation only and is intended to support discussions with the client and assist providers when considering service options. This information is also available in the Services and Referrals for my Organisation tabs in the client record.

3. If you select **VIEW REFERRAL SUMMARY AND CLIENT RECORD**, the **Referrals for my organisation** screen will display. Any referrals issued to your organisation for the client will be displayed.

Master Bart SAMPSON
Male, 81 years old, 1 March 1944, AC01907385
SPRINGFIELD, VIC, 3544

Primary contact: Bart Sampson (self) - 0423 634 898
No support relationships recorded

Referral summary for Bart Sampson

Client summary | Client details | **Referrals for my organisation** | Plans | Attachments | Approvals | Services | My Aged Care interactions | Notes | Tasks and Notifications | Residential Care

Referrals for my organisation

ACCEPT REFERRAL | ACCEPT TO WAITLIST | REJECT REFERRAL
SEE SERVICE DETAILS

Support at Home

About this referral	About this service
Issued Date 21 May 2025	Home Support Ongoing - SaH Classification 5
Due Date 24 May 2025	Assistive Technology Ongoing - Specified needs - Continence Products
	Home Modifications Short-term - HM Medium

▼ Priority Low

You can view the following information in the **Client summary** tab (client contact details and full address details can only be viewed once a referral has been accepted):

- Personal information
- Primary contact person
- Identity information and status of identity check
- Communication requirements
- Address details (Suburb, State/Territory and postcode only)
- Payment details
- Health insurance details
- Service information
- Current notes.

You can view the following information on the other tabs of the client record:

- Support plan
- Attachments
- Approvals under the Act
- Services in place
- Tasks and notifications for that client
- Current and previous assessment and support plan review information



To accept the referral, refer to **Step 4**.

To reject the referral, refer to **Step 5**.

To accept the referral to waitlist, refer to **Step 6**.

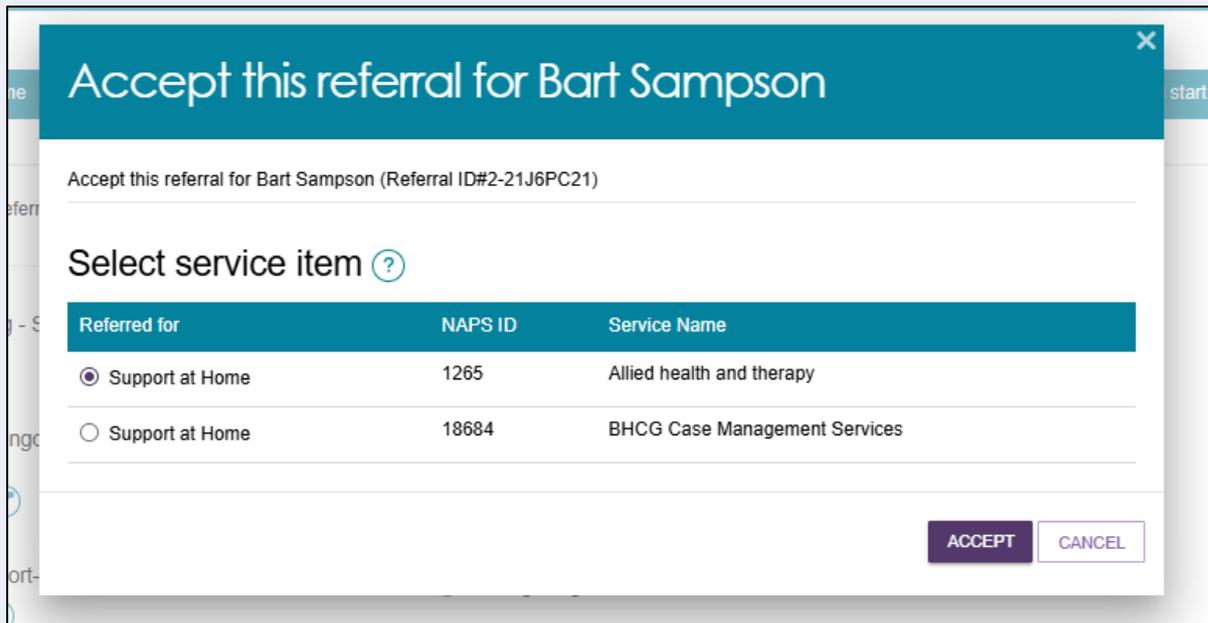
The [Service and Support Portal User Guide – The Client Record](#) contains further information about navigating the client record and what information can be viewed.

- To accept the referral, select **ACCEPT REFERRAL** from the **Referral summary** page or from the expanded card or list view in **Incoming referrals** tab.

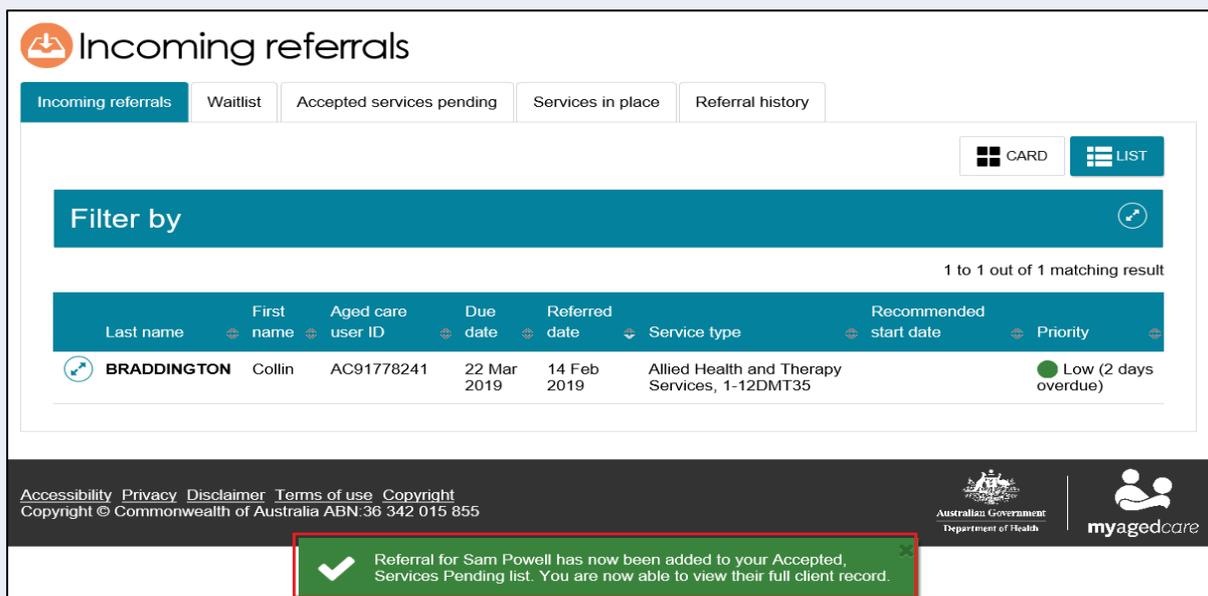
! It is critical that you review the referral and client information and that you have decided to provide services to the client prior to accepting the referral.

Only accept the referral once the provider has confirmed the capacity to deliver the required services. Client agreement to proceed should also be confirmed prior to acceptance.

Select the correct service item name or NAPS Service ID (if your organisational has more than one service or NAPS ID available for the service type) you wish to link the referral to. Confirm that you want to accept the referral by selecting **ACCEPT**.



A confirmation banner will appear at the bottom of your screen confirming your acceptance of the referral and advising that the referral, and access to the client’s full record including complete address and contact information, will be available through the **Accepted services pending** tab.



! Once a referral has been accepted, service delivery information must be provided within the priority status timeframes; details regarding this can be found in the My Aged Care - Service and Support Portal Resources page on the Department’s Website.

- To reject the referral, select **REJECT REFERRAL** located next to **ACCEPT REFERRAL** on the referral card or Referral summary page.

Incoming referrals

Incoming referrals | Waitlist | Accepted services pending | Services in place | Referral history

Filter by

1 to 1 out of 1 matching result

Last name	First name	Aged care user ID	Due date	Referred date	Referred for	Recommended start date	Priority
SAMPSON	Bart	AC01907385	24 May 2025	21 May 2025	Support at Home, 1265		Low

VIEW REFERRAL SUMMARY AND CLIENT RECORD

ACCEPT REFERRAL | ACCEPT TO WAITLIST | REJECT REFERRAL

You will be asked to select a reason for rejecting the referral from a drop-down list. You may also choose to enter additional information in the **Rejection reason** free text field.

Comments regarding the **Rejection reason** are displayed to other My Aged Care users but not in the client's My Aged Care Online account. Providing a rejection reason assists assessors and the My Aged Care contact centre to support clients in accessing services.

Reject referral for Bart Sampson

X You must select a reason for rejection.

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

You are about to reject the referral for Bart Sampson (Referral ID#2-21J6PC21).

Reason for rejecting *

Select one

- Select one
- Client in respite/hospital
- Client ineligible
- Client uncontactable
- Outside service region
- Referral made in error
- Insufficient capacity
- No one accredited
- Conflict of interest
- Other
- Further info to be added
- Service no longer required
- Client deceased
- Unable to process referral



! Rejecting a referral with the reason of **Client deceased** will change the client's status to **Deceased** and make the client record read-only.

Any unaccepted service referrals will be recalled, services in place will be ceased, assessments will be cancelled and the client's access to the client portal will be revoked.

My Aged Care will not send correspondence to the client or their registered supporters and/or appointed decision makers after the status is changed to **Deceased**.

Where a client is active in the Support at Home Priority System or has been assigned Support at Home funding, this will remove the client from the Support at Home Priority System and withdraw any assigned Support at Home funding.

Upon rejection, a confirmation banner will appear at the bottom of the screen.



Referral for Collin Braddington has been rejected and removed from your list of incoming referrals.

! If you do not have capacity to provide the service/s, your administrator should update your service availability and information in the portal. This is described in [Service and Support Portal User Guide Part 1 – Administrator Functions](#).

6. If you are unable to provide the service at the time and you have a waitlist available, you can **accept the referral to your waitlist**.

VIEW FULL CLIENT RECORD

ACCEPT REFERRAL

ACCEPT TO WAITLIST

REJECT REFERRAL

The referral will appear in your outlet's **Waitlist** tab. Note that this option is only available if the service is configured by your Organisation Administrator to offer waitlist.

This process is described in [Service and Support Portal User Guide Part 1 – Administrator Functions](#).

4.2.3 Revoking a referral after acceptance

There may be circumstances after you have accepted a referral for service that affect your ability to provide services to that client. For example, the client withdraws their consent for service provision, or their circumstances change.

You can only revoke accepted referrals where service delivery information has not been entered and/or services haven't commenced.

The department will monitor the use of this functionality, and notifications will be sent to service providers where 20% or more of referrals issued to the outlet over a period of 12 months have been revoked after acceptance.

When a referral is revoked after acceptance, other referrals (such as from a broadcast or preference referral) will be automatically issued.

Follow these steps to revoke a referral after acceptance:



1. Navigate to the **Accepted services pending** tab in the **Service referrals** section of the Service and Support Portal and locate the accepted referral that you wish to revoke.

You can filter the results by expanding the **Filter** functionality, sort the results by editing the sort order and selecting **GO**, or change the display of information between **Card** or **List** views.

Select the accepted referral you wish to revoke and expand the information. You are then able to select **REVOKE REFERRAL**.

2. Select the reason for revocation from the drop-down menu and enter detailed information in the **Comments** section to explain why you are revoking the referral after acceptance.

Select **REVOKE REFERRAL**.



Revoke Clark Kagle referral

 You should only accept a referral for service where you intend to provide services to a client. If the circumstances have changed and you're no longer able to provide services to a client, then you can revoke the accepted referral once you've provided a reason.

Please note that the department monitors revoked referrals as they have a direct impact on the timely delivery of aged care services to clients.

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

Please select a reason for revocation after acceptance (*)

Reason for revocation after acceptance *

Select one

Select one

Client deceased

Client withdrew

Unable to deliver service

Other

0 / 500

REVOKE REFERRAL
CANCEL

- You will receive confirmation that the referral has been revoked, and it will no longer appear in your **Accepted services pending** tab.

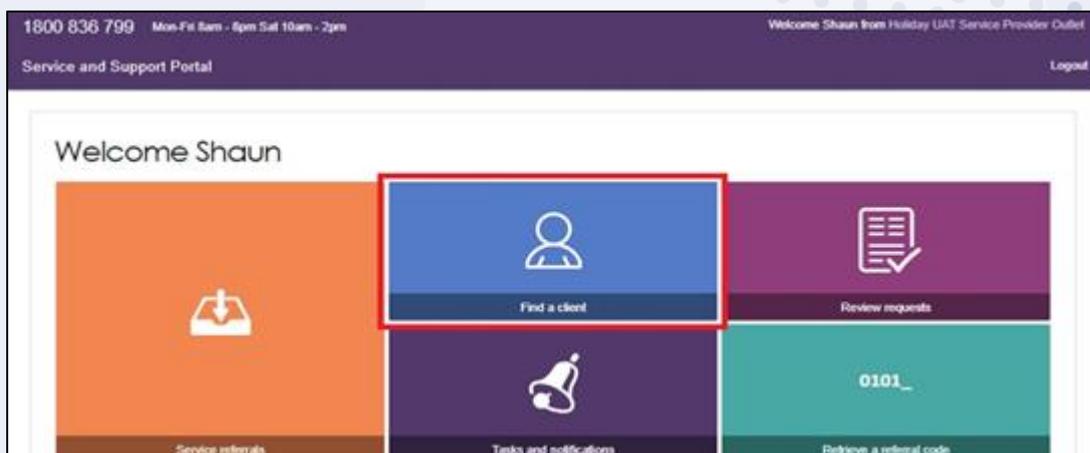
 You have successfully revoked this referral after acceptance for Clark Kagle.

5. Clients and Services

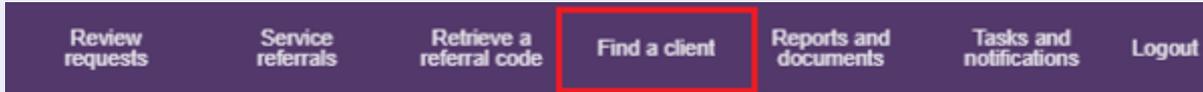
Follow these steps to find a client who has been referred to or accepted to service by your organisation.

5.1 Find a client

- Select **Find a client** from the home page.



Alternatively, from any page in the Service and Support Portal, you can choose the **Find a client** option from the tool bar at the top right-hand corner of the page to find the referral for that client.



- On the **Find a client** page, you can search for a client by entering the first name and/or last name of the client.

The image shows the 'Find a client' search interface. It has a header with a person icon and the text 'Find a client'. Below this is a 'Search by' section with three input fields: 'Last name:', 'First name: E*' (with a small 'x' icon), and 'Aged Care User ID:'. There are two buttons: 'ADVANCED SEARCH' and 'CLEAR ADVANCED'. Below these are two more buttons: 'SEARCH' (highlighted with a red box) and 'CLEAR'.

Any matching results will be displayed.

The image shows the 'Find a client' search interface with search results. The search criteria are 'Last name:', 'First name: E*', and 'Aged Care User ID:'. There are buttons for 'ADVANCED SEARCH', 'CLEAR ADVANCED', 'SEARCH', and 'CLEAR'. A 'Recently Viewed Persons' list is shown on the right, containing names and AC numbers. Below this is a table of search results with columns: Last name, First name, Aged care user ID, Address, Locality, Status, and Home contact number. The results show five entries, with the first one being 'HERAS Earle'.

Last name	First name	Aged care user ID	Address	Locality	Status	Home contact number
HERAS	Earle	AC97222012	6 PALLIN Street	GUNGAHLIN, ACT, 2912	Active	(02) 7321 1106
HOUSLER	Emerson	AC89170112	94 CAPTAIN COOK Crescent	GRIFFITH, ACT, 2603	Active	(02) 3032 8284
MOECKEL	Elena	AC83337212	12 SENTRY Crescent	PALMERSTON, ACT, 2913	Active	(02) 9851 3519
SHARRARD	Emily	AC62634112	Unit 1 28 FLINDERS Street	EDEN, NSW, 2551	Active	(02) 1284 9052
TUED	Ethon	AC56084156	No address details found	No address details found	Active	

- You can also select **ADVANCED SEARCH**. Advanced Search options available for **Find a client** include:

- Aged Care Payment Management System (ACMPS) number
- Aged Care User ID
- Centrelink Customer Reference number (CRN)
- Client Status
- Date of Birth
- Department of Veterans' Affairs (DVA) card number
- First name
- Home contact number
- Last name
- Locality
- Medicare Card Number



- Postcode
- Preferred name
- State
- Suburb
- System for the Payment of Aged Residential Care (SPARC) number.

5.2 Viewing client information

You can only view information about clients that have been referred to your organisation.

Once you have [found a client](#), you can view information contained in the client record.

You can view all information about a client, apart from their full address and contact details, prior to accepting a referral.

Follow these steps to view client information:

1. Select the client's name from the list of search results.

The screenshot shows the 'Find a client' search page. The search criteria are: Last name: _____, First name: R*, Aged Care User ID: _____. There are buttons for 'ADVANCED SEARCH' and 'CLEAR ADVANCED'. Below the search criteria, there is a 'First name is R*' filter and 'SEARCH' and 'CLEAR' buttons. On the right, there is a 'Recently Viewed Persons' sidebar with a list of names and IDs: Rodney RICHARDS AC11088069, Rachael JONES AC06928923, George KELLY AC35529304, and Clark KAGLE AC54864004. Below the search results, there is a table with columns: Last name, First name, Aged care user ID, Address, Locality, Status, and Home contact number. The table contains one row: Jones, Rachael, AC06928923, 23 FURZER Street, PHILLIP, ACT, 2606, Active. There are 'CARD' and 'LIST' view toggles in the top right corner.

Alternatively, select **Service referrals**, select the expansion arrow on the client card in card view of expanded record in list view, and then select **VIEW REFERRAL SUMMARY AND CLIENT RECORD**.

CARD VIEW:

The screenshot shows the 'Incoming referrals' page. The top navigation bar includes '1800 836 799', 'Mon-Fri 8am - 8pm Sat 10am - 2pm', and 'Welcome Anne from Aged Care Inc - Outlet 1'. The main navigation includes 'Service and Support Portal', 'Review requests', 'Service referrals', 'Retrieve a referral code', 'Find a client', 'Reports and documents', 'My Aged Care interactions', 'Tasks and notifications', and 'Logout'. The page title is 'Incoming referrals'. There are tabs for 'Incoming referrals', 'Waitlist', 'Accepted services pending', 'Services in place', and 'Referral history'. There is a 'Filter by' section with 'Sort Referrals by: Date Referred' and 'in order of: Latest to Earliest'. There is a 'GO' button. Below the filter, it says 'Current sort order is Date Referred' and '1 to 1 out of 1 matching results'. The main content area shows a card for 'Rachael JONES' with details: 'PHILLIP, ACT, 2606', 'Aged care user ID: AC06928923', 'Date referred: 21 May 2018', 'Due date: 23 May 2018', 'Outlet: Aged Care Inc - Outlet 1', and 'Service type: Residential Permanent, 4321'. There is a red 'High' priority indicator at the bottom of the card.



LIST VIEW:

Incoming referrals

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
JONES	Rachael	AC06928923	23 May 2018	21 May 2018	Residential Permanent, 4321		1 day overdue

About this referral

Outlet: Aged Care Inc - Outlet 1
Date referred: 21 May 2018
Date due: 23 May 2018
Referral comments: No referral comments provided

About this service

Service type: Residential Permanent
Service sub type: No sub types
Service item name: Residential Permanent - At Provider Location
Naps service id: 4321

[VIEW REFERRAL SUMMARY AND CLIENT RECORD](#)

[ACCEPT REFERRAL](#) [REJECT REFERRAL](#)

2. The **Referrals** for my organisation' page will be displayed.

Mike HILL
Female, 89 years old, 11 February 1930, AC45014933
MIRELLA Unit 4, 90 GOZZARD STREET GUNGAHLIN, ACT, 2912

Primary contact: Mike Hill (self)
No representatives or relationships recorded

Referral summary for Mike Hill

[REQUEST A REVIEW](#) [VIEW PDF OF CLIENT RECORD](#)

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

Referrals for my organisation

Meals: At Home

Referral Accepted on 12 February 2019

About this referral

Issued Date: 12 February 2019
Due Date: 20 March 2019

Priority: Low

3. A summary snapshot of the client record is also available in PDF format by selecting the **VIEW PDF OF CLIENT RECORD** from any tab in the client record, and includes client details, support network details, notes, assessment history, care approvals and the client's interactions with My Aged Care.

Mike HILL
Female, 89 years old, 11 February 1930, AC45014933
MIRELLA Unit 4, 90 GOZZARD STREET GUNGAHLIN, ACT, 2912

Primary contact: Mike Hill (self)
No representatives or relationships recorded

Referral summary for Mike Hill

[REQUEST A REVIEW](#) [VIEW PDF OF CLIENT RECORD](#)

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

Referrals for my organisation

Meals: At Home

The client record contains client information displayed across eight tabs, which are described in more detail below.

The client record contains tabs with the following information:



- Client summary
- Client details
- Support Network
- Approvals
- Plans
- Attachments
- Services
- My Aged Care interactions
- Notes
- Task and Notifications

5.2.1 Client Summary

The **Client summary** tab contains a dashboard of key information (Client summary) about the client's interactions with My Aged Care.

The **Client summary** provides information about the client's interactions with My Aged Care, including: Assessments, Approvals, Service recommendations, Service delivery status, Client goals, and Reablement and linking support periods (where available).

This screenshot shows multiple classifications for both Support at Home and Assistive Technology.

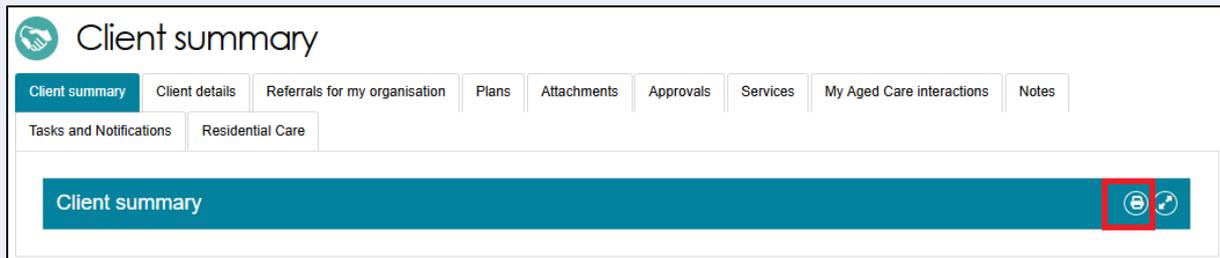
The screenshot displays the My Aged Care Client Summary dashboard for Bruce WAYNE. The interface includes a top navigation bar with contact information (1800 836 799) and a user profile (Welcome Chris). The main content area is titled 'Client summary' and features a navigation menu with tabs for Client summary, Client details, Referrals for my organisation, Plans, Attachments, Approvals, Services, My Aged Care interactions, Notes, and Tasks and Notifications. The 'Client summary' tab is active, showing a dashboard with the following sections:

- Assessments:** Three 'Comprehensive Assessment' entries are listed. The first is 'Assessment in progress on 12 July 2024' with referral code ASSESSOUTLET_royihvh. The second and third are 'Finalised on 12 July 2024' and 'Finalised on 4 October 2023' respectively, both with referral code ASSESSOUTLET_royihvh.
- Recommendations and approvals:** A 'Support at home' section is highlighted with a question mark icon. It lists: 'Home support Ongoing - SaH Classification 3', 'Home support Ongoing - SaH Classification 4', and 'Assistive technology Short-term - AT Medium' and 'Assistive technology Short-term - AT High'. A link 'View support at home letters' and a 'SEE SERVICE DETAILS' button are also present.
- Service delivery status:** A 'Referral code 2-12345678909877' is shown with a list of funding assignments: 'Home support Ongoing - SaH Classification 3 funding pending', 'Home support Ongoing - SaH Classification 4 funding assigned 21 November 2025', 'Assistive technology Short-term - AT Medium funding pending', and 'Assistive technology Short-term - AT High funding assigned 21 November 2025'.
- Concerns:** A single concern is listed: 'The Joker breaking out of Arkham'.

The footer of the dashboard includes accessibility and privacy information, the Australian Government logo, and the myagedcare logo.



Client summary information can be printed in a similar format as it is displayed within the portal by using the **print page** button on the right-hand side of each heading.



5.2.2 Client Details

The **Client details** tab contains basic demographic and contact information about the client.

Clients and their support network (including registered supporters, agents and/or appointed decision makers) may automatically be opted in to receive copies of Support at Home letters. At the same time, they may also receive notifications in the portal.

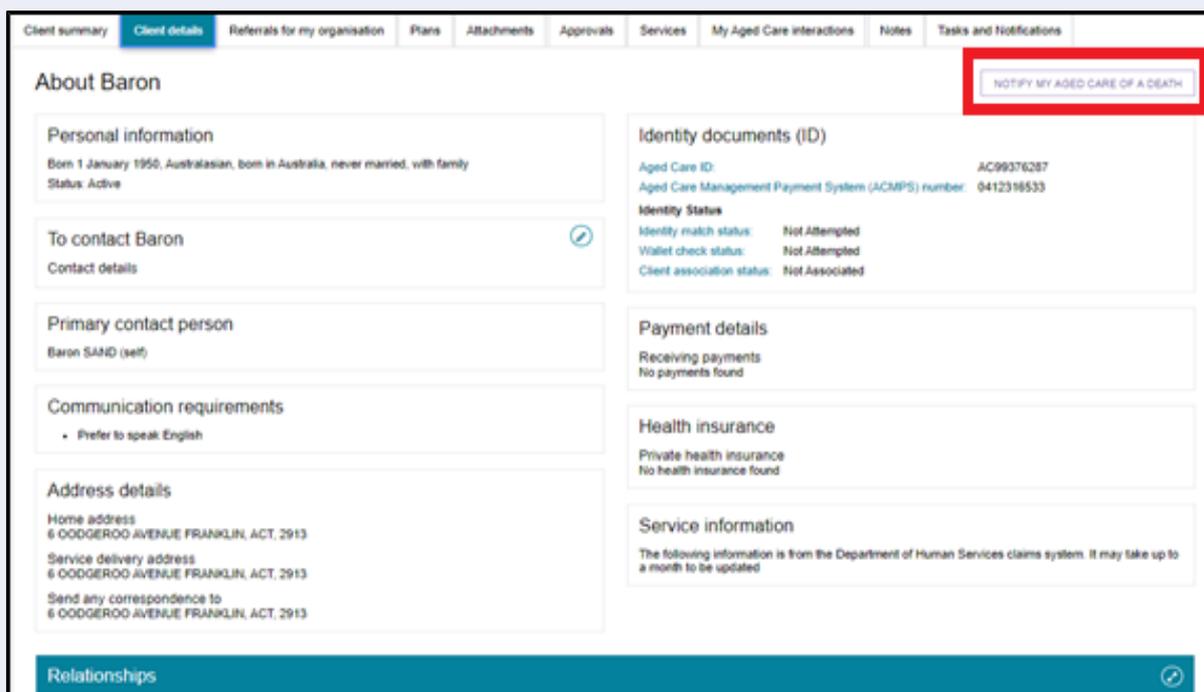
Registered supporters who are Supporter Lite should not automatically receive information or documents that are given to the client under the Aged Care Act (2024).

Registered supporters and Organisation agents can opt out of receiving copies of Support at Home letters by calling My Aged Care.

Supporter guardians can opt the client out from receiving Support at Home letters but they themselves cannot opt out.

The **Client Details** tab also has links to current notes, the client's current support plan, and any services that are in place.

Providers may report that the client is now deceased using the **NOTIFY MY AGED CARE OF A DEATH** button on this page.



! If a client's status is **Deceased**, the client's record will be read-only, and you will not be able to make any edits. Additional notes and attachments can be attached to the client record for 14 days after ceasing services. Providers will also receive notifications reminding them to close or finalise any in-progress tasks relating to the client.

A banner will be displayed on all tabs of a **Deceased** client record.

If the client's status is incorrect, please contact the My Aged Care service provider and assessor helpline on 1800 836 799.



5.2.3 Support Network

The **Support Network** tab displays details about the client's support network, such as the client's primary contact, registered supporters and/or appointed decision maker, agent (organisation) GP, carer, emergency contact, or other support person.

This tab will only appear at a client's record if there are supporters registered under the new Aged Care Act and recorded in My Aged Care. Refer to the Assessor Portal guide on [Registering Support People and Adding Relationships](#) for further information on how to add relationships.

If this tab is not available, the **VIEW SUPPORT NETWORK** link will instead go to the **Client Details** tab. The Primary Contact details will always show above this link. It will also show the Primary Contact's relationship/s with the client.

Providers may report that a client's support person is now deceased using the **NOTIFY MY AGED CARE OF DEATH** button on this page.

In the **Support Network** tab, you can do the following:



- View the client's support network, divided into the People, Organisations and Other Relationships categories. The **People** cards show the support person's name, relationship to client, whether they are the primary contact, date of relationship, contact details, and whether the relationship is active.
- Depending on the status of the relationship/s, you could Activate the relationship, Delete the relationship, Edit relationship details, or (for Carers) start a Call Back Request from Carer Gateway and/or Dementia Australia Helpline. For more information on these functions, refer to Assessor Portal guide on [Registering Support People and Adding Relationships](#).
- If the client also supports other people in My Aged Care, there will be another tab called **People <Client> supports** next to the **<Client's support network>**.

5.2.4 Referrals for My Organisation

The **Referrals for my organisation** tab display service referrals that have been issued to or accepted by your organisation.

5.2.5 Plans

The **Plans** tab contains detailed information about current and previous screening and assessments the client may have had, including client goals, recommendations and motivations, as well as the resulting support plan. Select the double arrow icon next to each heading to display detailed information captured during the assessment.

Providers will be able to access read-only versions of a client's support plan and previous



screening and assessments. This information can be downloaded and printed if required – select the **View Client Report** button on the top right of the Plans page to generate a RTF (Rich Text Format) version of the report.

 			
Jacquelyne Scholl Aged Care ID: AC64811805 Date of Birth: 28/06/1939			
Client Details			
Age	86	Gender	Female
Medicare number	21354976592	DVA Card number	not applicable
Address	3 8 LIBERTY Court, MILDURA, VIC, 3500, Australia		
Lives With	Lives alone	Accommodation type	PR Client Owns/Purchasing
Phone – Home	+610259447099	Phone – Mobile	+610222639775
Email	Sydney.Bouchard@test.deakss.xoc	Fax	not applicable
Preferred phone	Mobile	Preferred correspondence method	not applicable
Country of Birth	Australia	Ethnicity	Australian
Preferred Language	English	Requires Help to Communicate	No
TIS Required	not applicable	NRS Required	N
Marital status	Married (registered/de facto)	Aboriginal and/or Torres Strait Islander Status	No - Neither
Veteran or War Widow/Widower	not applicable	DVA Entitlement	not applicable
Private health insurance	not applicable	Receiving payments	not applicable

5.2.6 Attachments

The **Attachments** tab contains documents that have been attached to the client record. To upload an attachment to the client record, select **ADD AN ATTACHMENT** from this tab.


Attachments

[REQUEST A REVIEW](#)
[VIEW PDF OF CLIENT RECORD](#)

Client summary
Client details
Referrals for my organisation
Plans
Attachments
Approvals
Services
My Aged Care interactions
Notes
Tasks and Notifications

Attachments

ADD AN ATTACHMENT

Assessment Attachments

Other Attachments

Correspondence

No attachments found to be displayed.

There are four different attachment types that can be added to a client's record:

- **Assessment Attachments** are any documents that are relevant to the client's assessment, for example, clinical notes or a discharge summary.
- **Other Attachments** are documents that relate to the client's general circumstances, for instance, documents related to the nomination of a support person (including legal documents), Occupational Therapist drawings used in home modifications.
- **Correspondence** includes documents or letters generated in My Aged Care for various programs, including Support at Home and others, at different stages of service delivery.
- **Sensitive Attachments** are documents for clients of a sensitive nature. Where a client



record has a Sensitive Attachment, provider(s) who have received a referral for or are providing services to a client will be notified that a Sensitive Attachment exists for the client. Contact the last assessment organisation, or the My Aged Care service provider and assessor helpline to access information within the Sensitive Attachment.

! If an attachment has been uploaded in error, please contact the My Aged Care service provider and assessor helpline on 1800 836 799 for deletion.

5.2.7 Approvals

The **Approvals** tab contains a view of a client's approvals for aged care services under the *Aged Care Act 2024*.

Client summary | Client details | Referrals for my organisation | Plans | Attachments | **Approvals** | Services | My Aged Care interactions | Notes

Tasks and Notifications | Residential Care

Approvals

The client is approved for the following care types under the Aged Care Act 2024

Current care approvals

- Residential Permanent
- Home support Ongoing - Transitioned HCP Level 2 [VIEW HISTORY](#)
 - Priority category: Standard
 - Approval starts: 29 June 2022
 - Status: Committed effective 17 February 2026
 - Place assigned: FSO
 - Place assigned date: 17 February 2026
 - Take up deadline: 14 April 2026
 - Source System: Gateway
 - Home support services:
 - Seeking services

DHS prior approvals last updated: Never

Residential Permanent Place: Allocated

You have been allocated a funded Residential Permanent place. You may now begin to look for a residential aged care home that is suitable for your care needs. For more information, please visit the My Aged Care website [here](#).

- Status: Allocated effective 1 July 2024
- Urgency for this care type: Low
- Priority category: Category 3
- Place allocation date: 8 April 2025

[VIEW HISTORY](#)

If a client has an approval for an Aged Care service or classification, the details of pending funding and assigned funding will be displayed underneath **Current care approvals**.

! If there has been a previous assessment, the approved classification that hasn't ceased will also display under the client record.

The below screenshot shows an example of Home Support's Assistive technology and Home modifications classifications.



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

Service and Support Portal Service referrals Find a client Review requests Tasks and notifications Retrieve a referral code My Aged Care interactions Staff administration Reports and documents Outlet administration Government provider management system Logout

Home | Find a client | Abigayle LUCIO (Shyanne)

Abigayle LUCIO (Shyanne)

Female, 91 years old, 14 September 1932, AC62735350
 AVOCA BLK A Level A Unit 22, 116 EASTY STREET PHILLIP, ACT, 2606
 Prefers to speak Chinese Primary contact: Sydni Alya (Friend) - 61 2966 0000
[View support network](#)

Care approvals

Client summary | Client details | Support network | Referrals for my organisation | Plans | Attachments | **Approvals** | Services | My Aged Care interactions | Notes | Tasks and Notifications | Residential Care

Approvals

The client is approved for the following care types under the Aged Care Act 2024

Current care approvals

Assistive Technology Ongoing - Specified needs - Assistance Dog [VIEW HISTORY](#)

Priority category: Medium

Approval starts: 8 November 2016

Status: Allocated effective 15 February 2017

Place assigned: FSO

Place assigned date: 9 February 2017

Take up deadline: 20 February 2017

Source system: Gateway

Assistive Technology services: **Equipment and Products:** Communication and information management products, Self-care products, Mobility products, Managing body functions, Domestic life products, Assistive technology prescription and clinical support

Seeking services

Home Modifications Short-term - HM Medium [VIEW HISTORY](#)

Priority category: Medium

Approval starts: 8 November 2016

Approval stops: 8 November 2017

Status: Allocated effective 15 February 2017

Place assigned: FSO

Place assigned date: 9 February 2017

Take up deadline: 20 February 2017

Source system: Gateway

Home Modification services: **Home Adjustments:** Home modification products, Home modifications prescription and clinical support

Seeking services

Home Support Ongoing - SAH Classification 5 [VIEW HISTORY](#)

AccessibilityPrivacyDisclaimerTerms of useCopyright
 Copyright © Commonwealth of Australia ABN:83 605 426 759

Australia Government Department of Health and Aged Care

5.2.8 Services

The **Services** tab contains a record of:

- Services the client is currently receiving
- Services that are pending (Not yet in place)
- Service referrals yet to be accepted
- Previous services the client has received.

The below screenshots show Home Support services. When they are in place, this section will also show the funding status (eg. Pending) or when the funding was assigned, when the service started, and the full name of the service that was approved.



Services Not in Place

Services not yet in place ✕

● Low

Support at Home

Home Support Ongoing - SaH Classification 3 Recommended dates

Assistive Technology Ongoing - Specified needs - Assistance Dogs and Confinence Products

Assistive Technology Short-term - AT High

Home Modifications Short-term - HM Medium

Service provided by

Bendigo Health Services - Community Care Mildura - Support at Home Accepted 7 May 2025

SEE SERVICE DETAILS
ADD SERVICE INFORMATION

Services in Place

Services in place ✕

Support at home

Wayne Enterprises - Gotham

Phone: 1234567890
Address: 123 Gotham Rd GOTHAM VIC 1234
Email: grayson.richard@wayne.com

Support at Home Ongoing
 Service commenced: 22 January 2025
 Assistive Technology Short-term
 Service commenced: 22 January 2025

Support at home services approved:	Home Support Ongoing - SaH Classification 5
Funding assigned:	12 December 2024
Support at home services approved:	Home Support Ongoing - SaH Classification 7
Funding pending:	
Support at home services approved:	Assistive Technology Short-term - Medium
Funding assigned:	12 December 2024
Support at home services approved:	Assistive Technology Short-term - High
Funding pending:	

SEE SERVICE DETAILS

5.2.9 My Aged Care Interactions

The **My Aged Care interactions** tab will show the client's history of interactions with My Aged Care, for example, a phone call to the My Aged Care contact centre, or (for carer relationships) a history of call back requests to the [Carer Gateway](#) or [Dementia Australia Helpline](#).

Client summary
Client details
Referrals for my organisation
Plans
Attachments
Approvals
Services
My Aged Care interactions
Notes
Tasks and Notifications

5.2.10 Notes

The **Notes** tab contains notes that have been created about the client.

Client summary
Client details
Referrals for my organisation
Plans
Attachments
Approvals
Services
My Aged Care interactions
Notes
Tasks and Notifications

Filter by ✕

Sort by:
Please select GO

ADD A NOTE

Date created	End date	Note type	Description	Created by organisation	Created by outlet	Note status
11/02/2019		Other	Elizabeth called the contact centre - wants to register, is lonely and requests meals on wheels.	My Aged Care	My Aged Care	● Active

There are different types of notes in the **Notes** tab of the client record, listed in the table below:



Note type	Who can add?	Who can view?	Description	Examples
Client Story	Assessor	Client Provider Assessor	A summary of the client's current circumstances.	Mrs Jones has just been discharged from hospital and is seeking help at home. Lives with her husband and has early onset dementia.
Observations	Provider Assessor	Provider Assessor	Observations from service provider and/or assessors' interactions with clients.	There is a dog on the property. Mrs Smith seems more energetic than she did during my last visit.
Other	Client Provider Assessor	Client Provider Assessor	Additional information about the client.	Jennifer has planned respite on 01/08/2017.

! When the My Aged Care contact centre staff or assessors add a **Sensitive note** about a client, there will be a flag informing service providers that there is a sensitive note about the client and instructing them to call the My Aged Care contact centre for more information.

- This client has a sensitive note on their record. Please call My Aged Care on 1800 200 422 for further information.

5.2.11 Tasks and Notifications

The **Tasks and Notifications** tab will display all tasks and notifications for a singular client.

You can only view tasks and notifications that are associated to your outlet and for clients you are providing services to.

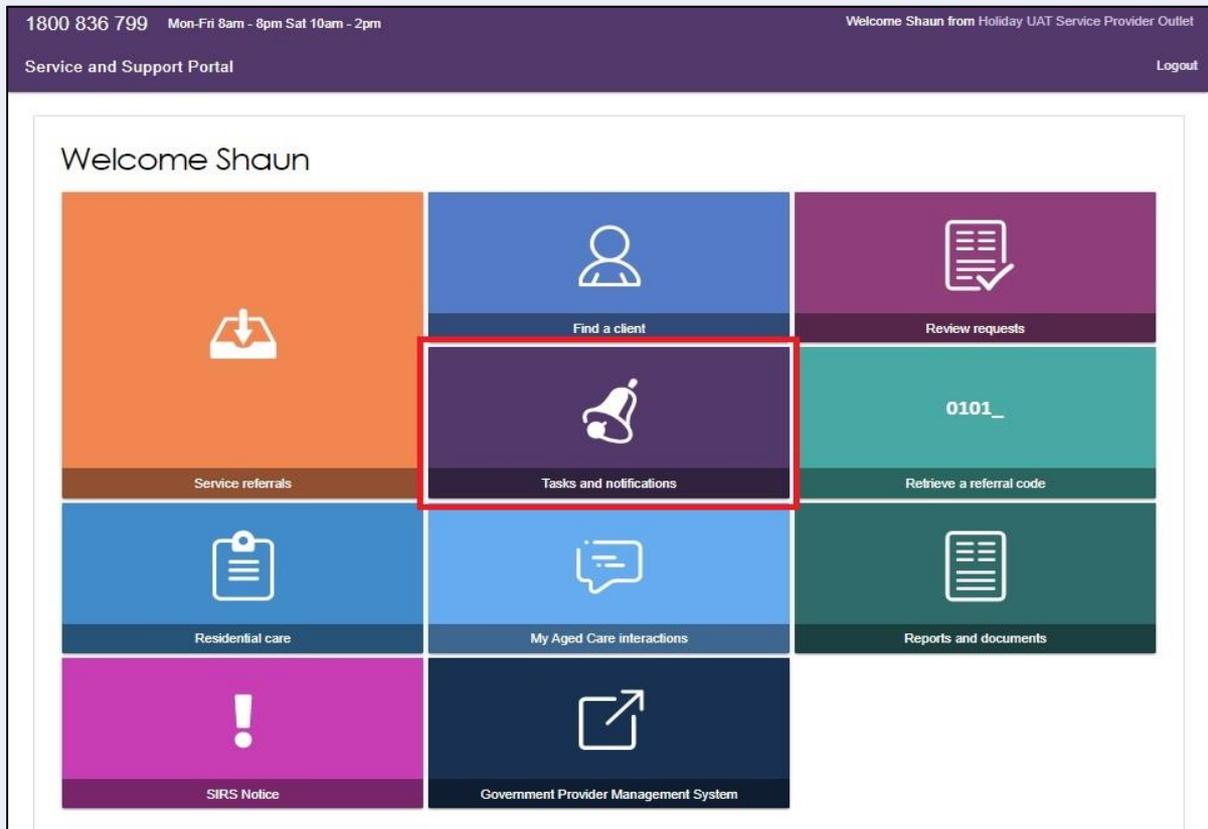
Type	Due Date	Received Date	Category	Title/Description	Activity Id	Portal	Outlet
Notification		11/02/2019	Referrals	New Referral You have a new referral from My Aged Care. Referral created at : 11/02/2019 10:38 Aged Care User Id: AC15338866 Outlet Name : Aged Care Inc - Outlet 2 Service Type : Social Support Group Priority: Medium Go to: Incoming Referrals	1-55826169385	Service Provider Portal	Aged Care Inc., Aged Care Inc - Outlet 2
Notification		11/02/2019	Referrals	New Referral You have a new referral from My Aged Care. Referral created at : 11/02/2019 10:37 Aged Care User Id: AC15338866 Outlet Name : Aged Care Inc - Outlet 2 Service Type : Meals Priority: Medium	1-55825180416	Service Provider Portal	Aged Care Inc., Aged Care Inc - Outlet 2



5.3 Viewing tasks and notifications

You can view tasks and notifications in the Service and Support Portal. The steps to view tasks and notifications are outlined below.

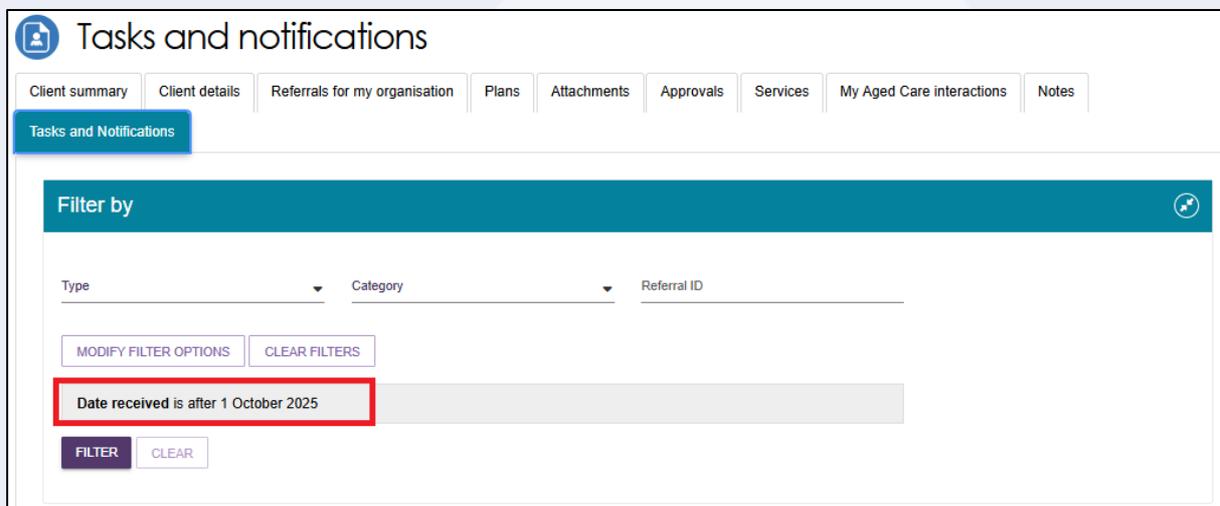
1. From the Service and Support Portal homepage select **Tasks and notifications**.



In the **Notifications** tab, you will be able to view notifications from the last 30 days that are relevant to your role.

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

Any notifications older than 30 days will be removed and will no longer be visible in the portal.



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

Type	Due Date	Received Date	Category	Title/Description	Activity Id	Portal	Outlet
Notification		11/02/2019	Referrals	New Referral You have a new referral from My Aged Care. Referral created at : 11/02/2019 10:38 Aged Care User Id: AC15338866 Outlet Name : Aged Care Inc - Outlet 2 Service Type : Social Support Group Priority: Medium Go to: Incoming Referrals	1-55826169385	Service Provider Portal	Aged Care Inc., Aged Care Inc - Outlet 2
Notification		11/02/2019	Referrals	New Referral You have a new referral from My Aged Care. Referral created at : 11/02/2019 10:37 Aged Care User Id: AC15338866 Outlet Name : Aged Care Inc - Outlet 2 Service Type : Meals Priority: Medium	1-55825180416	Service Provider Portal	Aged Care Inc., Aged Care Inc - Outlet 2

You will only be able to view tasks and notifications that are associated to your outlet and for clients you are providing services to. In the **Notifications** tab, you can sort notifications by: Received date, Category, Title/Description, Aged Care User ID, and Client name.

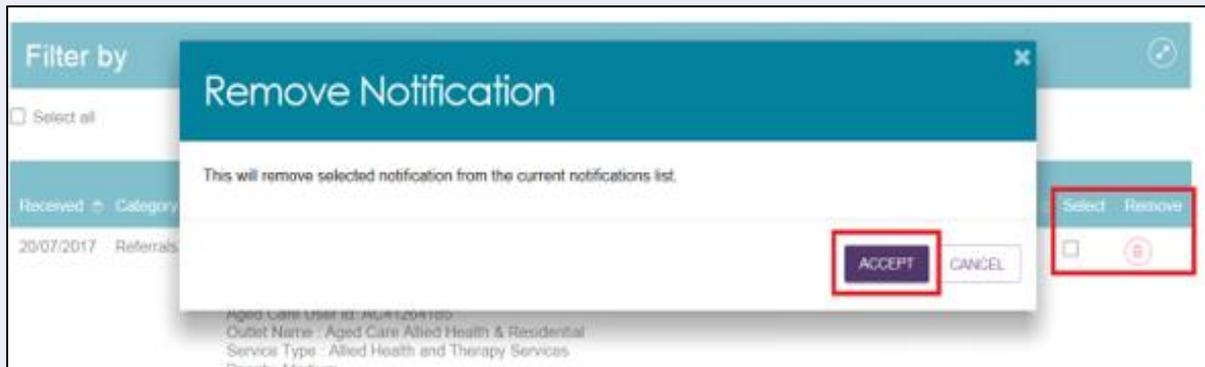
Type	Due Date	Received Date	Category	Title/Description	Channel	Activity Id	Portal
Task		16/07/2024	Client Services	Incomplete Service Information Aged Care User Id: AC64811805 Service type: Outlet name: Bendigo Health Home Care Services - Community Care Mildura Referral acceptance date: 06/18/2024 15:14:52 SLA information: 28 days from the Referral Acceptance Date Information missing: Next Review Date Frequency Intensity Assigned to: ANDRE, Janeen Go to: Client Services	2-	154453173718	Service and Support Portal

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

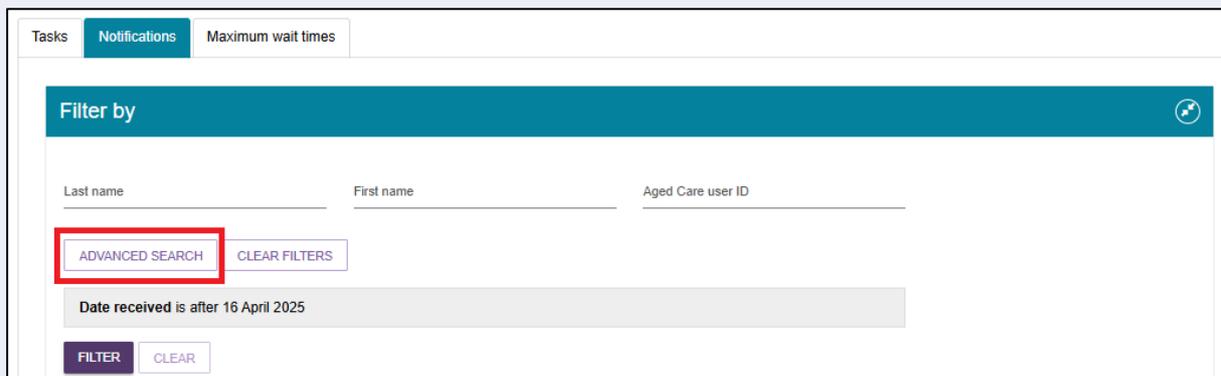
Received	Category	Title/Description	Aged Care User ID	Client name	Select	Remove
28/06/2017	Referrals	New Referral You have a new referral from My Aged Care. Referral created at : 20/07/2017 18:29 Aged Care User Id: AC41264185 Outlet Name : Aged Care Allied Health & Residential Service Type : Allied Health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



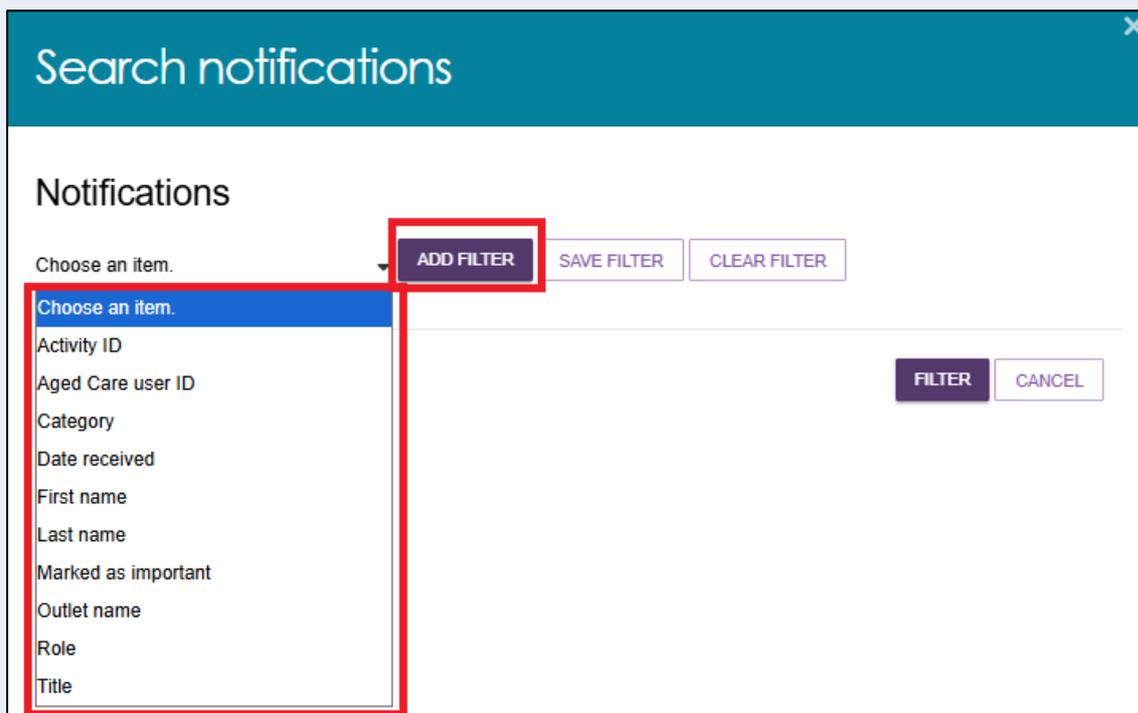
You can also remove individual or bulk notifications from your portal by selecting the rubbish bin icon.



2. 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. You can filter notifications by **Date received** and navigate directly to the associated client record by selecting **View client record**



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 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.

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

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)

5.4 Completing identity verification

To complete the identity verification process, it is expected that whoever has contact with the client in the first instance (that is, an assessor or service provider) will sight the client identification and record this information on the client record via the Assessor or Service and Support Portal.

The steps for recording that client identification have been sighted are outlined below.

- From the Service and Support Portal homepage, select **Find a client**.

2. You can search for a client by their first name, last name or by the client's Aged Care ID.

Find a client

Search by

Last name: First name: Aged Care User ID:

[ADVANCED SEARCH](#) [CLEAR ADVANCED](#)

First name is Delbert and Last name is Rekus

[SEARCH](#) [CLEAR](#)

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

Current sort order is Last name

Delbert REKUS

Kirkby
Lot Number 353 MCDUGALL Street
GLENVALE QLD 4350
(02) 2851 5474
Aged Care ID AC80589965

Active

Alternatively, you can access the client record from your **Accepted services pending** tab in the **Service referrals** section.

Accepted services pending

Incoming referrals Waitlist **Accepted services pending** Services in process Referred history

Delbert REKUS

Aged 93 (23 December 1923), Male

About this referral

Issued Date 9 December 2016
Accepted Date 9 December 2016
Accepted By Bupa Rangeville

About this service

Service type Residential Permanent
Service sub type:
Recommended start date none
Recommended review date none
Recommended end date none
Service commencement date none

Referral comments

Client contact details

Preferred contact number 0228515474

[VIEW CLIENT RECORD](#) [VIEW PDF OF CLIENT RECORD](#) [REQUEST A REVIEW](#)

[ADD SERVICE INFORMATION](#) [REVOKE REFERRAL](#)

3. Once you have navigated to the client record of the client for whom you wish to conduct a wallet check, select **Conduct a wallet check now**.



Client summary

REQUEST A REVIEW | VIEW PDF OF CLIENT RECORD

Warning: The client has not yet completed a wallet check. Conduct a wallet check now.

Client summary | Client details | Referrals for my organisation | Plans | Attachments | Approvals | Services | My Aged Care interactions | Notes | Tasks and Notifications

Client summary

Assessments

Home Support Assessment (a) | Screening (a)

Assessment Complete on 12 February 2019 | Complete on 11 February 2019
Regional Assessment Service ☎ 02 2821 2453

Recommendations and approvals | Service delivery status

Help at home – Entry level support (Commonwealth Home Support Programme) | Meals | Started on 12 February 2019 - Aged Care Inc - Outlet 1 ☎ 02 2821 2453

4. A Wallet Check pop up appears. Select the appropriate option from the list:

- **My client has identification**
- **My client has no valid identification this time**
- **My client will be unable to produce valid identification.**

If your client can provide you with identification, select **My client has identification**. select at least two types of identification documents that you sighted from the list provided and enter the date you performed the wallet check. Finally, select **SAVE DETAILS**.

Wallet check

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

Client wallet check:*

My client has identification

My client has no valid identification this time

My client will be unable to produce valid identification

Common types of identification

Please check two types of ID from the following list. By ticking each box, you are confirming you have sighted the original document.

Medicare Card

DVA Card

Drivers License

Health Care Card

Passport

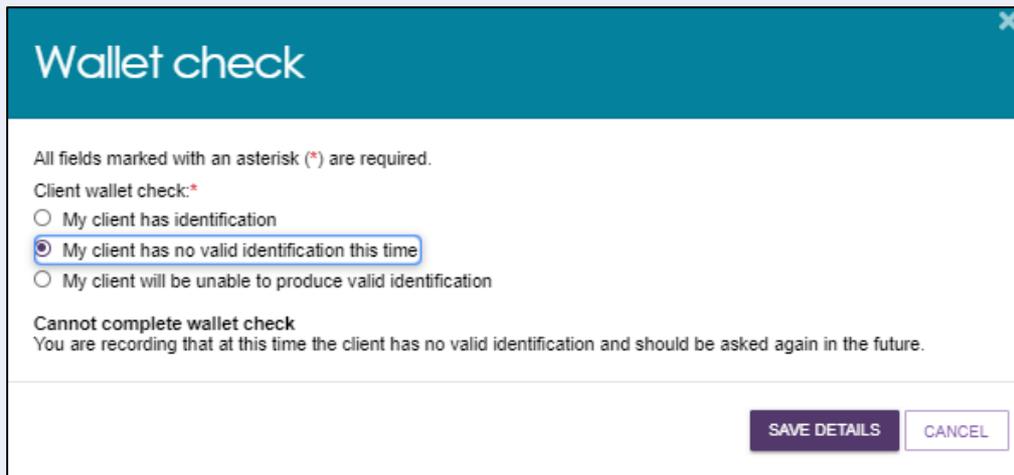
SHOW MORE TYPES OF IDENTIFICATION THAT CAN BE SIGHTED

Date that you performed the wallet check:
07/02/2023

SAVE DETAILS | CANCEL



If your client is unable to provide you with identification, you can select **My client has no valid identification this time**, or **My client will be unable to produce valid identification** and select **SAVE DETAILS** and this information will be updated on the client record.



! The status of the Wallet Check on the client record will remain incomplete until client identification documents have been sighted.

5.5 Adding service information

Service delivery information should be recorded on the My Aged Care client record for all clients accepted for service. This includes service commencement date, service frequency, intensity and service end dates where a service has ceased.

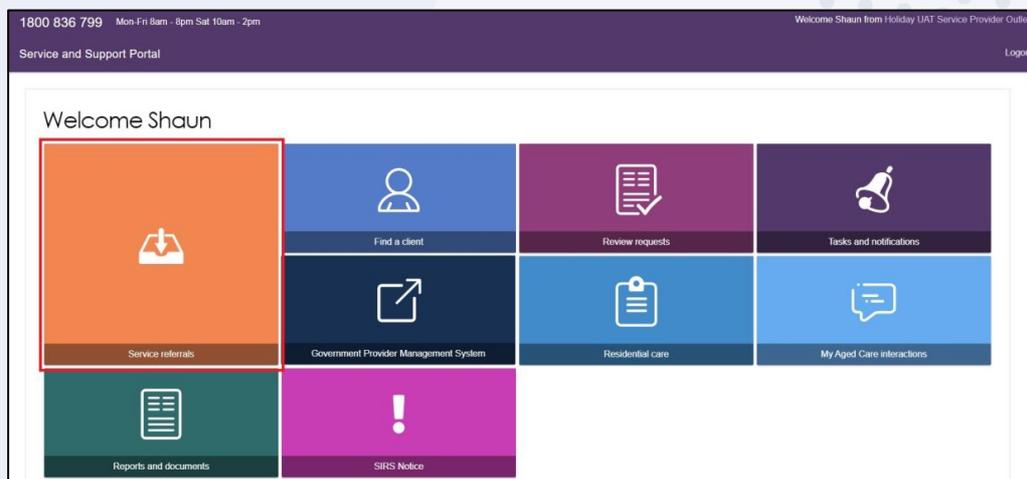
This information should be recorded within 14 calendar days of acceptance, and providers will receive notification reminders prompting them to enter this information if it is not completed within this timeframe.

For Home Support and Residential Care Permanent services, the service commencement date will be automatically populated from Service Australia's records and will be read-only.

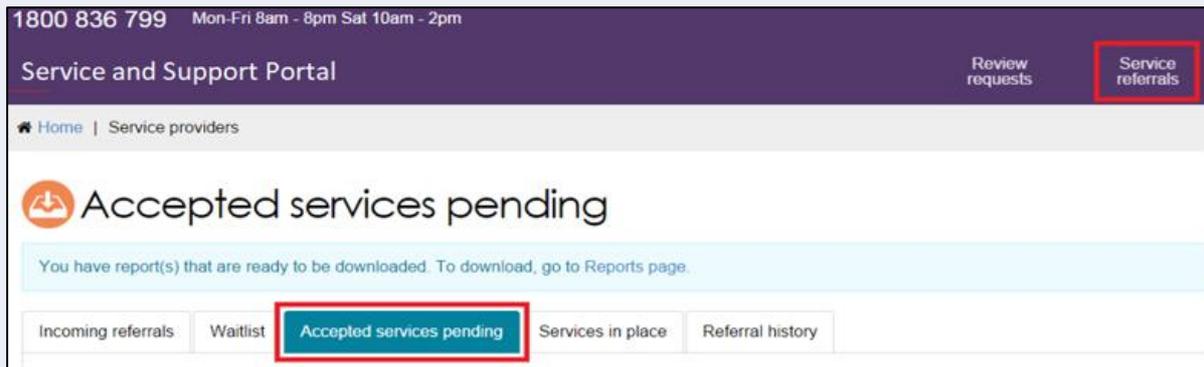
Follow these steps to add information about the services being delivered to the client:

1. Select **Service referrals** from the Service and Support Portal homepage.

Alternatively, if you know the client's name you can use the **Find a client** tile.

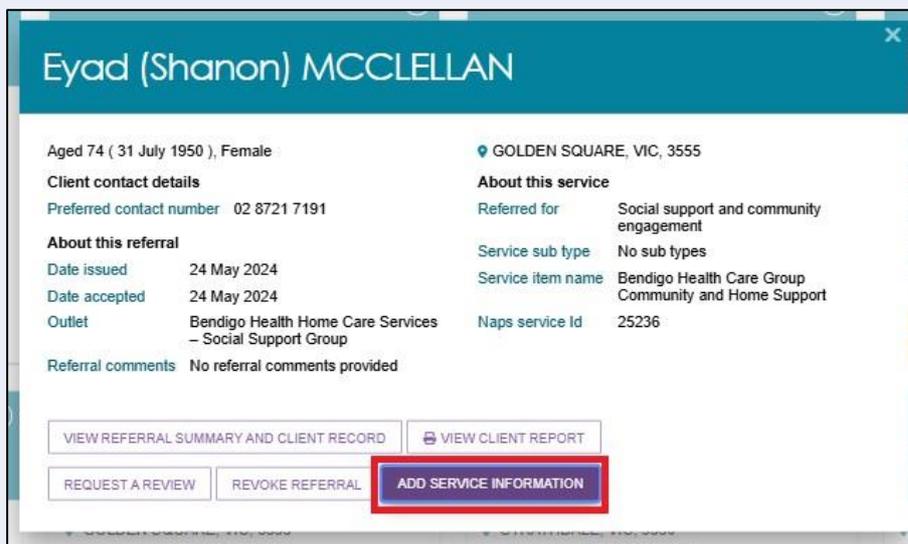


2. Select the **Accepted services pending** tab.

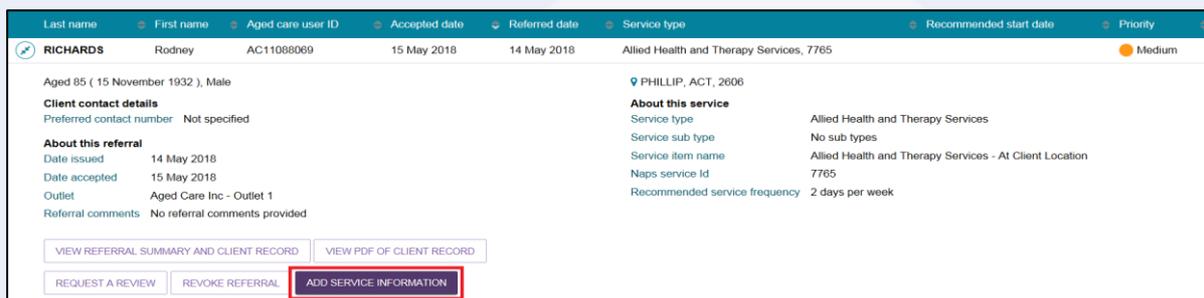


Once you have located the relevant client's service referral in the **Accepted services pending** tab, you can add service delivery information for the service.

Select the arrow on the **Client card** to view the expanded client card view and select **ADD SERVICE INFORMATION**.



Alternatively, you can select **ADD SERVICE INFORMATION** in the expanded list view.



The **Add service information** screen will be displayed.

3. When adding service information for Residential Care Respite, Transition Care, and Commonwealth Home Support Program services you must enter the **Service start date**, input a **Frequency**, and select an **Intensity** from the drop-down list (all three inputs are mandatory). Enter any additional information in the remaining fields and select **SAVE CHANGES**.



To supply specific service delivery information, select **Other – Specify** and enter additional service delivery information in the free text field.

- Once saved, the client will move from the **Accepted services pending** tab to the **Services in place** tab, and the populated service information will display under the **Services** section within the client record.

The **Service start date** will update once the commencement date has been received from Services Australia.

! For Support at Home and Residential Care referrals, the **Add Service Information** button will not be visible until the referral has been recommended and approved during assessment. This ensures the correct services are confirmed before being entered into the client record.

For other programs, this button may be available earlier depending on the referral setup.

Enter any additional information in the remaining fields and select **Save changes**.

Once saved, the client will only move from the **Accepted services pending** tab to the **Services in place** tab if a **Service start date** is present. The populated service information will now display under the **Services** section within the client record.

The below screenshot shows a Support at Home service displayed under the client's **Services** tab, under the Current services in place section. It contains a service start date which is displayed on the right hand side.

Client summary Client details Support network Referrals for my organisation Plans Attachments Approvals **Services** My Aged Care interactions Notes

Tasks and Notifications Residential Care

Current services in place

Support at Home

Service provided by Bendigo Health Services - Community Care Mildura - Support at Home

About this referral From the assessor From the service provider

Referral details Recommended dates About the service

Support at home services approved: Home support Ongoing - Transitioned HCP Level 2 Ongoing

Funding assigned: 23 April 2024 Service commenced 18 June 2024

Accepted 19 June 2024 1:14 am

[SEE SERVICE DETAILS](#)

- For all referrals, the **Add Service Information** button will be displayed once the service has been recommended and approved during assessment. This ensures accurate and up-to-date commencement information is recorded.

Last name First name Aged care user ID Accepted date Referred date Referred for Recommended start date Priority

BASHIRIANF AUTODevontea AC82056979 16 May 2025 16 May 2025 Support at Home, 18684 High

Aged 67 (30 April 1958), Male ZILLMERE, QLD, 4034

Client contact details About this service

Preferred contact number 08 4257 8681 Referred for Support at Home

About this referral Service item name BHCG Case Management Services

Date issued 16 May 2025 Naps service Id 18684

Date accepted 16 May 2025

Outlet Bendigo Health Home Care Services - Community Care Bendigo

Referral comments No referral comments provided

Home Support Ongoing - SaH Classification 6 Funding assigned

Home support

[VIEW REFERRAL SUMMARY AND CLIENT RECORD](#) [VIEW CLIENT REPORT](#)

[REQUEST A REVIEW](#) [REVOKE REFERRAL](#)

- The Expanded view will show the recommended Support at Home services.

Last name First name Aged care user ID Accepted date Referred date Referred for Recommended start date Priority

BASHIRIANF AUTODevontea AC82056979 16 May 2025 16 May 2025 Support at Home, 18684 High

Home support

Home or community general respite: Community and centre-based respite, Flexible respite

Nursing care: Registered nurse clinical care, Nursing assistant clinical care, Enrolled nurse clinical care, Nursing care consumables

Nutrition: Nutrition supports

Domestic assistance: General house cleaning, Laundry services, Shopping assistance

Home maintenance and repairs: Gardening, Assistance with home maintenance and repairs, Expenses for home maintenance and repairs

Meals: Meal delivery, Meal preparation

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

Transport: Direct transport, Indirect transport

Care management: Home support care management

Personal care: Assistance with self-care and activities of daily living, Assistance with self-administration of medications, Continence management (non-clinical)

[VIEW REFERRAL SUMMARY AND CLIENT RECORD](#) [VIEW CLIENT REPORT](#)

[REQUEST A REVIEW](#) [REVOKE REFERRAL](#)

! The service start date is automatically updated when the Aged Care Entry Record (ACER) is processed by Services Australia. To avoid errors in receipt of your funding, you must ensure you have accepted a referral for service for a client prior to submitting the ACER. Once the ACER is completed, this will move the service referral from the **Accepted services pending** tab to the **Services in place** tab.

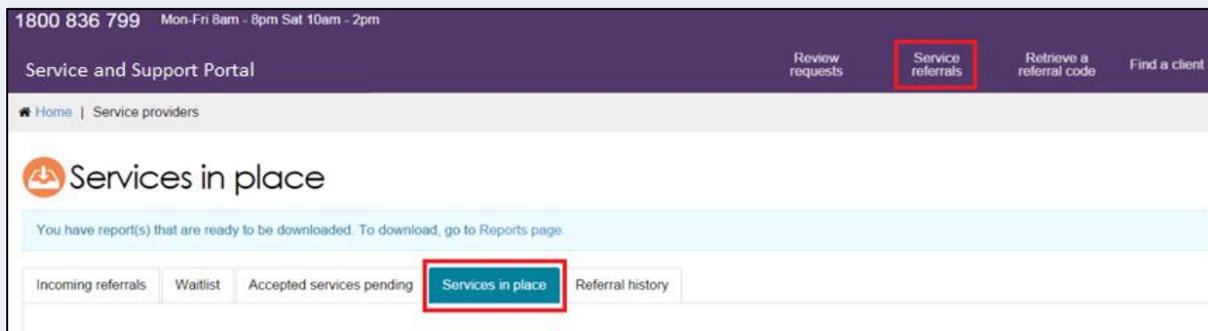


5.6 Updating service information

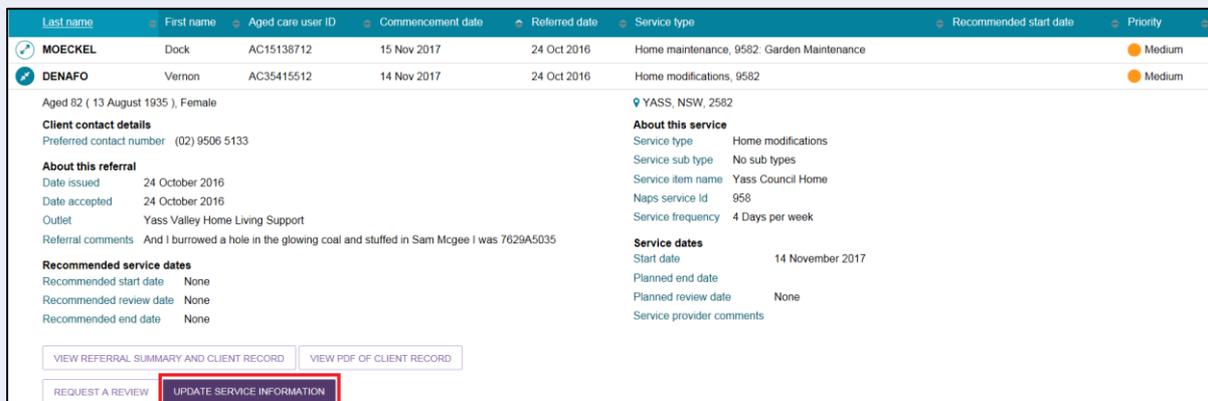
The **Services in place** tab in the **Service referrals** section of the Service and Support Portal displays accepted services that have service delivery information recorded.

! For the Support at Home program, updating service information will not be available as the services required are approved by an assessor. As a provider, you can request a Support Plan Review when the participant's needs, goals or circumstances change or the participants needs additional services. See section [Requesting a Support Plan Review \(SPR\) to meet changing needs](#).

1. Navigate to the **Services in place** tab by selecting **Service referrals** from the home page, the banner at the top of the screen from any page within the portal, or the menu bar in the top left.



For the service you are updating, expand the **Client list** to view the expanded client list view and select **UPDATE SERVICE INFORMATION**.



Alternatively, you can select **UPDATE SERVICE INFORMATION** in the expanded card view.

Vernon DENAFO ✕

Aged 82 (13 August 1935), Female 📍 YASS, NSW, 2582

<p>Client contact details</p> <p>Preferred contact number (02) 9506 5133</p> <p>About this referral</p> <p>Date issued 24 October 2016</p> <p>Date accepted 24 October 2016</p> <p>Outlet Yass Valley Home Living Support</p> <p>Referral comments And I burrowed a hole in the glowing coal and stuffed in Sam Mcgee I was 7629A5035</p> <p>Recommended service dates</p> <p>Recommended start date None</p> <p>Recommended review date None</p> <p>Recommended end date None</p>	<p>About this service</p> <p>Service type Home modifications</p> <p>Service sub type No sub types</p> <p>Service item name Yass Council Home</p> <p>Naps service Id 958</p> <p>Service frequency 4 Days per week</p> <p>Service dates</p> <p>Start date 14 November 2017</p> <p>Planned end date</p> <p>Planned review date None</p> <p>Service provider comments</p>
---	---

Update service information and select **SAVE CHANGES**. This information will now be updated on the **Services in place** tab and the **Services** tab in the client record.

- Service delivery information can also be updated from the **Services** tab in the client record by selecting **UPDATE SERVICE INFORMATION** for the relevant service.

Client record | Referrals for my organisation | Plans | Attachments | Approvals | Services | My Aged Care interactions | Notes | Tasks and Notifications

Current services in place ↻

Transition Care
Service provided by Aged Care Allied Health & Residential

<p>About this referral</p> <p>Referral details</p> <p>Accepted date 12 July 2017 4:17 pm</p> <p>Service provider comments</p> <p>None</p>	<p>From the assessor</p> <p>Recommended dates</p> <p>Recommended start date None</p> <p>Recommended end date None</p> <p>Recommended review date None</p> <p>Approval details</p> <p>Approval start date 12 July 2017</p> <p>Approval end date None</p>	<p>From the service provider</p> <p>About the service</p> <p>Service frequency 7 Days per week</p> <p>Service dates</p> <p>Start date 12 July 2017</p> <p>Planned end date None</p> <p>Planned review date None</p> <p>Service delivery status Commenced</p> <p>Grace period end date None</p>
--	--	---

! Ceasing a client's service with the reason of **Client deceased** will change the client's status to **Deceased** and make the client record read-only. Any unaccepted service referrals will be recalled, services in place will be ceased, assessments will be cancelled and the client's access to the client portal will be revoked.

My Aged Care will not send correspondence to the client or their support network after the status is changed to **Deceased**. However, providers will be sent a notification reminding them to close or finalise any in-progress activities relating to the client.

Where a client is active in the Support at Home Priority System or has been assigned a Support at Home classification, this will remove the client from the Support at Home Priority System and withdraw any assigned Support at Home funding.



5.6.1 Record a note of changes made to client service information

My Aged Care contact centre staff, assessors and providers can view and add different types of notes about clients in the My Aged Care portals.

If there is significant change to a client's service delivery information, it is recommended that providers [update the service information](#) and add a note to the client record.

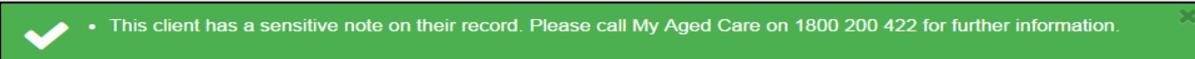
! If a client's needs or circumstances have changed since their last assessment, a review of the client's Support plan may be required. The process for requesting a review of a client's Support plan is described in the [Request a Support Plan Review \(SPR\) to meet changing needs](#) section. For clients that need to be reclassified for residential funding purposes, refer to the [Requesting Residential Funding Reassessments](#) section.

Providers can **add the following notes** to the client record:

- **Observations:** Observations from service provider and/or assessors' interactions with the client. Assessors and providers can view these notes.
- **Other:** Additional information about the client. Assessors, providers and clients can view these notes.

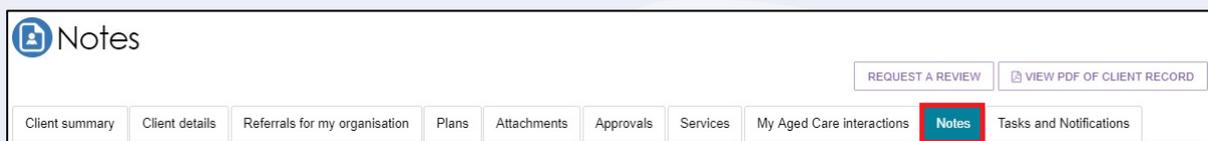
Providers can only view notes of type **Client story**, **Other** and **Observations**.

When My Aged Care contact centre staff or assessors adds a **Sensitive note** about a client, a banner will appear on the client record advising providers to call the My Aged Care contact centre for more information. Information on the content of the sensitive note will only be provided where relevant to the provider.

 This client has a sensitive note on their record. Please call My Aged Care on 1800 200 422 for further information.

Follow these steps to add a note to the client record:

1. Navigate to the client record (refer to the guide [Service and Support Portal User Guide - The Client Record](#) for more details) and select **Notes**.



Notes on the client record will be displayed.

2. Select **ADD A NOTE** and choose the note type and a description. Once this information is filled out, you add the note to the client's record by selecting **SAVE**.

Mike HILL
 Female, 89 years old, 11 February 1930, AC45014933
 MIRELLA Unit 4, 90 GOZZARD STREET GUNGAHLIN, ACT, 2912

Primary contact: Mike Hill (self)
 No representatives or relationships recorded

Notes

Client summary | Client details | Referrals for my organisation

Filter by

Sort by:
Please select

ADD A NOTE

Date created | End date

11/02/2019

Add a note

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

Type: * ?

End date: 📅
(e.g. dd/mm/yyyy)

Description: * 0 / 500
(500 Characters)

SAVE CANCEL

Alternatively, from the **Client details** tab, select **ADD A NOTE** from the **Current notes** section.

Client summary | **Client details** | Referrals for my organisation | Plans | Attachments | Approvals | Services | My Aged Care interactions | Notes | T

About Mike

Personal information
 Born 11 February 1930, Australian, born in Australia, married (registered/de facto), with partner

To contact Mike
 Contact details ✎

Primary contact person
 Mike HILL (self)

Communication requirements

- Prefer to speak English

Address details

Home address
 MIRELLA Unit 4, 90 GOZZARD STREET GUNGAHLIN, ACT, 2912

Service delivery address
 MIRELLA Unit 4, 90 GOZZARD STREET GUNGAHLIN, ACT, 2912

Send any correspondence to
 MIRELLA Unit 4, 90 GOZZARD STREET GUNGAHLIN, ACT, 2912

Relationships

Current notes

SEE ALL **ADD A NOTE**

You can add notes of type **Other** and **Observations** to the client record of any clients that have been referred to your outlet. For example, clients in your **Incoming referrals** tab. These notes will be visible to My Aged Care contact centre staff, assessors, and other providers delivering services to that client.

The blue question mark symbol ? is a help hint which explains the various note types and who can view them, as there is a different audience per note type.

For further information about note types and who can view them, refer to the guide [Service and Support Portal User Guide - The Client Record](#) available on the Department's website.



5.6.2 Request an extension to the client's care

Care extension requests, including respite care, can be actioned through the Service and Support Portal. This request will be sent to the Delegate for approval. If you are unable to complete a care extension request for a client via the Portal, call the My Aged Care service provider and assessor helpline on 1800 836 799.

Periods of Transition Care can be extended to a maximum of 42 consecutive days; whilst periods of Residential Respite care can be extended for a maximum of 21 non-consecutive days.

Care extensions are effective from the commencement date within the request pending the Delegate's approval. Extension requests cannot be backdated, except in special cases. For more information please refer to the [My Aged Care Assessment Manual](#).

! Extension requests through the My Aged Care Service and Support Portal must be requested on, or before, the number of entitled days ending if the client requires additional care.

Follow these steps to request a care extension:

1. Find the client you wish to request a care extension for, by navigating to the **Services in place** tab and expanding the card or list view for the client. Select **REQUEST [CARE TYPE] EXTENSION**. The following two screenshots show examples of a transition care extension, and a residential respite care extension.

TRANSITION CARE EXTENSION EXAMPLE

The screenshot displays the Lucas EDEN interface for a client's service details. The client is identified as 'Aged 83 (5 May 1935), Male' located at 'PHILLIP, ACT, 2606'. The service is 'Transition Care' with a frequency of '5 days per week'. The 'REQUEST TRANSITION CARE EXTENSION' button is highlighted with a red border.

Client contact details		About this service	
Preferred contact number	Not specified	Service type	Transition Care
About this referral		Service sub type	No sub types
Date issued	20 February 2019	Service item name	Transition Care
Date accepted	20 February 2019	Naps service Id	1-PNMTQ3O
Outlet	Aged Care Inc - Outlet 2	Service frequency	5 days per week
Referral comments	No referral comments provided	Service dates	
		Start date	20 February 2019
		Planned end date	None
		Planned review date	None
		Service provider comments	No provider comments provided

Buttons at the bottom: VIEW REFERRAL SUMMARY AND CLIENT RECORD, VIEW PDF OF CLIENT RECORD, REQUEST A REVIEW, **REQUEST TRANSITION CARE EXTENSION**, UPDATE SERVICE INFORMATION

RESIDENTIAL RESPITE CARE EXTENSION EXAMPLE

Mrs Cindy CLIENT
Female, 83 years old, 1 January 1940, AC/20144282
84 OODGEROO AVENUE FRANKLIN, ACT, 2913
Prefers to speak: Chinese

Primary contact: Cindy Client (self) - 0426 821 526
Carer: UAT Eichmann UAT Queenin (Neighbour) - 61 2907 1234
[View support network](#)

Cindy Client services

REQUEST A REVIEW VIEW CLIENT REPORT

Client summary Client details Support network Referrals for my organisation Plans Attachments Approvals **Services** My Aged Care interactions

Notes Tasks and Notifications Residential Care

Current services in place

Residential Respite Care
Service provided by Aussie Aged Care

About this referral

Referral details
Accepted

From the assessor

Approval details
Approval start date 22 September 2022

From the service provider

About the service

Service dates
Start date 2 September 2022
Service delivery status Commenced
Grace period end date None

UPDATE SERVICE INFORMATION **REQUEST RESIDENTIAL RESPITE EXTENSION**

Alternatively, locate the client through the **Find a client** functionality, and navigate to either the **Services** or **Approvals** tab of the client record and select **REQUEST [CARE TYPE] EXTENSION**.

Care approvals

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

Approvals
The client is approved for the following care types under the Aged Care Act 1997.

Current care approvals

- Home Care Package Level 4
- Residential Permanent
- Transition Care**

2. Complete all mandatory information indicated in the extension request pop up. The mandatory information will depend on the care type the extension relates to.
Once completed, select **SUBMIT REQUEST**.

! To assist the delegate, when submitting an extension request you are required to include the paid days balance from the Services Australia Aged Care Payment system and the date when the balance was calculated.



TRANSITION CARE EXTENSION EXAMPLE:

Request transition care extension

All fields marked with an asterisk (*) are required.
 You are about to request a transition care extension for Lucas EDEN

Date of original entry into transition care? (dd/mm/yyyy): *
 12/02/2019

Proposed number of extension days (between 1 to 42 days): *
 42

Goals not achieved in 12 weeks of transition care: *
 Example goal

Goals for Lucas EDEN during extension period *
 Example goal

Team action required to achieve extension goals: *
 Example goal

Outside services action required to achieve extension goals: *
 Example goal

Information from other sources: *
 Example information

Client consent was obtained for this extension:

SUBMIT REQUEST
CANCEL

RESPIRE EXTENSION EXAMPLE:

Request residential respite extension

All fields marked with an asterisk (*) are required.
 You are about to request a 21 day residential respite extension for Martez COLBURN

Date of original Residential Respite Care approval was: 26 February 2023

When should the extension start? (dd/mm/yyyy) *
 30/05/2023

Reason for extension *
 Select one

Select one

Carer stress

Severity of the care recipient

Absence of the care recipient

Any other relevant matter

3. You will receive confirmation that the care extension request has been submitted to the Delegate.

✓ • Care approval extension request created.
 • The assessment and support plan has been sent to the Delegate for their decision

You will also receive a notification that the request has been submitted.

You will receive an email notification when the Delegate has made a decision on the care extension request.

Filter by							
Type	Due Date	Received Date	Category	Title/Description	Activity Id	Portal	Outlet
Notification		20/02/2019	Client Services	Care Extension Request A request for a care extension has been submitted. Details are as follows - Aged Care User Id: AC93976173 Service : Transition Care Requested By : BL_ZH274306 Requested by Outlet name : Aged Care Inc - Outlet 2 Request reason : Requested Status : Acceptance Pending Assigned to: MCDONALD, Leanne	1-55848678488	Service Provider Portal	Kingston Aged Care Assessment Service



5.6.3 Request a Support Plan Review (SPR) to meet changing needs

This functionality is for any client receiving subsidised aged care referred through the Assessor Portal.

! If your residential care client's care needs have changed and they need to be reclassified for residential funding purposes, refer to [Requesting Residential Funding Reassessments](#).

A provider can ask for a Support Plan Review (SPR) through the Services and Support portal when:

- their needs, goals, or circumstances have changed since their last assessment,
- their support plan no longer reflects their current situation,
- they need additional services, or
- a time-limited service has ended.

The assessor will then review the client's situation, which may lead to a new assessment of the client's needs.

The introduction of Support at Home services has expanded the circumstances under which an SPR can be submitted. SPRs are most likely initiated by the older person's provider (with consent), who can submit a request through the My Aged Care service and support portal. When requesting SPRs, providers must attach supporting documentation about the participant's current care arrangements, such as their quarterly budget and/or care plan.

Providers are encouraged to provide as much information as possible to inform of the client's need for, and urgency of, a support plan review or new assessment.

This information is available in the detailed assessment history information in the client's support plan in the **Plans** tab of the client record.

If a client has not previously had an assessment through My Aged Care, contact the My Aged Care service provider and assessor helpline on 1800 836 799 to request a new assessment.

Follow these steps to request a review of a client's support plan:

1. Check the client's assessment information. Refer to the **Plans** tab of the client record for more detailed assessment history information.

A request cannot be submitted for review if there is already an existing assigned review for the client in the assessor portal or an assessment is currently being undertaken. Check for this prior to starting a review request.

If you have any concerns, contact the assessment organisation who conducted the client's most current assessment (details included in the **Plans** tab).

Patsy Calledge support plan

REQUEST A REVIEW VIEW PDF OF CLIENT RECORD

Client summary Client details Referrals for my organisation **Plans** Attachments Approvals Services My Aged Care Interactions Notes Tasks and Notifications

Assessment Details

- Assessment information
 - Comprehensive Assessment was completed on 15 February 2019 by the Aged Care Assessment Service
 - Comprehensive Assessment status is Assessment Complete
 - The review date has not been specified
- Assessment summary
- Needs identified at assessment
- Assessment history
 - Comprehensive Assessment 15 February 2019
 - Screening 15 February 2019

2. Select **Service referrals** from the homepage.

1800 836 799 Mon-Fri 8am - 8pm Sat 10am - 2pm Welcome Shaun from Holiday UAT Service Provider Outlet

Service and Support Portal Logout

Welcome Shaun

Service referrals Find a client Review requests Tasks and notifications

Government Provider Management System Residential care My Aged Care interactions

Reports and documents SIRS Notice

3. Select **Services in place**. Locate the client for whom you wish to request a review and select **REQUEST A REVIEW**.

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	Commencement date	Referred date	Service type	Recommended start date	Priority
DENAFO	Vernon	AC38086799	19 Sep 2018	19 Sep 2018	Residential Permanent, 4321		Medium

Aged 83 (13 August 1935), Male YASS, NSW, 2582

Client contact details
Preferred contact number 02 9506 5133

About this referral
Date issued 19 September 2018
Date accepted 19 September 2018
Outlet Aged Care Inc - Outlet 1
Referral comments No referral comments provided

About this service
Service type Residential Permanent
Service sub type No sub types
Service item name Residential Permanent - At Provider Location
Naps service id 4321
Service frequency 7 days per week

Service dates
Start date 19 September 2018
Planned end date None
Planned review date None
Service provider comments No provider comments provided

VIEW REFERRAL SUMMARY AND CLIENT RECORD VIEW PDF OF CLIENT RECORD

REQUEST A REVIEW UPDATE SERVICE INFORMATION

Alternatively, a link to request a review will display at the top of any page in the client's record.



4. **(Service Providers only)** In the Request A Review screen, there is a checkbox that asks whether your client meets the requirements for a direct comprehensive assessment. After ticking Yes, you will be prompted to call the My Aged Care Service Provider and Assessor Helpline on 1800 836 799 to request the Contact Centre staff to issue a direct **referral for you**.

This will then be sent to the assessment organisation to review. A banner will be displayed on client records indicating a direct referral.

THE REQUEST A REFERRAL SCREEN FOR SERVICE FOR PROVIDERS (EXAMPLE)

5. Complete all mandatory fields within the review request.

Once you select a subsidised care type under **What type of subsidised aged care is the client receiving?** a second list for **Primary reason for Support Plan Review Request** will display.

The below screenshot shows example reasons for a client's SPR request. Different questions will need to be completed at this step depending on which option is selected.

Mr Effie Aleksandr GOBLE
Male, 74 years old, 6 September 1950, AC88525340 17 5 NELSON AVENUE HIGHTON, VIC, 3216

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

Request details

What circumstances have changed for the client? *

How has this affected the client's need? * (?)

Does this request need to be actioned urgently? (?) Yes

What type of subsidised aged care is the client receiving?*

- Support at Home(SaH)
- Commonwealth Home Support Programme (CHSP)
- Support at Home and Commonwealth Home Support Programme
- Flexible Care
- Residential Care

Primary reason for Support Plan Review Request*

- Request for additional CHSP services or changes to CHSP services for clients who are only receiving CHSP services current
- Request for additional CHSP services for clients who are in receipt of a HCP
- There is a change in client's circumstances and they have an immediate need for access to Support at Home services
- There is a significant change in the client's needs and additional Aged Care Act 2024 (the Act) based aged care services are

The table below outlines the circumstances that can be used to request a support plan review, as well as the circumstances in which a new assessment (instead of an SPR) will be required.

Circumstance	Definition
Hospital Discharge	Client has been discharged from hospital and requires a review of their current care needs and the type and level of support that will be required.
Fall(s) or risk of falling	Client has had a recent fall or is at risk of falling.
Change in medical condition	Client has had a recent change in a medical condition.
Change in cognition status	Client has had a recent change in their cognition status.
Change in care needs	Client has had a recent change in their care needs.
Increasing frailty	Client has increased in frailty.
Change in caring arrangements	Client has had a recent change in their caring arrangements.
Change in living arrangements	Client has had a recent change in their living arrangements.
Review service recommendations	Client is receiving Support at Home services and requires an additional service type within their current Support at Home classification.
Vulnerable client	Client is now vulnerable (e.g. experiencing or at risk of domestic or family violence or elder abuse, at risk of hospitalisation, primary carer is absent or non-existent).
Needs Transition Care program	If the client receiving other aged care services enters hospital and needs Transition Care program (TCP), a new assessment is required.

Circumstance	Definition
Needs Residential Care Permanent (N/A)	Clients needing residential care who have not had residential care added as a care type to their support plan will require a new assessment.
Needs Residential Respite (N/A)	Clients needing residential care who have not had residential respite care added as a care type to their support plan will require a new assessment.
Client has relocated	Client has moved or relocated.
Needs End-of-Life Pathway (high priority)	<ul style="list-style-type: none"> Request a high priority SPR to be assessed for End-Of-Life (EoL) pathway if the person is already on Support at Home or CHSP ongoing classification A person new to the aged care system who has not yet been assessed for aged care services will need a reassessment to be approved for the EoL pathway.
Review End-of-Life Pathway (high priority)	Request a high priority SPR to move to an ongoing SaH classification if the person need services beyond the EoL pathway funding period.
Review existing AT-HM funding tier	<ul style="list-style-type: none"> To request a higher Assistive Technology-Home Modifications (AT-HM) funding tier If participant's technology or equipment have repair or maintenance needs
Needs AT-HM funding tier	<ul style="list-style-type: none"> Addition of new Assistive Technology (AT) or Home Modification (HM) funding tier for participants with restorative care or End-of-Life classifications For existing HCP care recipients, providers can identify their AT and/or HM needs through the AT-HM scheme data collection. This is the preferred method for accessing AT-HM funding for this group. The AT-HM scheme data collection is a temporary process for transitioned HCP care recipients who have no or insufficient HCP unspent funds and who will have AT and/or HM needs between November 2025 and February 2026. All transitioned HCP care recipients will have approval to access the AT-HM scheme without a new aged care assessment. Alternatively, you can request a support plan review by an aged care assessor.
Needs Restorative Care	If participant is already approved for a Support at Home classification and needs access to a period of restorative care in order to improve level of function, they will need a new assessment conducted.
Review existing Restorative Care	Approval for additional services during the restorative care period, or provide evidence that additional funding is required.
Needs additional CHSP services (for existing CHSP participants)	To meet changing needs which may require additional CHSP services (when participant has already been approved for CHSP ongoing)
Needs CHSP ongoing	To close off a period of reablement support and/or meet changing needs which may include needing an ongoing service type after the episode of reablement has finished.

Circumstance	Definition
Immediate need for access to Support at Home	Participant has finished their End-of-Life period of support and needs to transition to an ongoing Support at Home classification.
Ongoing Support at Home (for existing participants)	Additional services within a service type that has already been included in the individual's support plan and is within the current Support at Home classification. This will be submitted by the individual's Support at Home provider.

If the client needs require urgent review, tick the **Yes** box next to **Does this request need to be actioned urgently?** and provide information in the reason field. This will help the assessor or contact centre to prioritise the client's support plan review request.

Does this request need to be actioned urgently? 0 / 1000
 Yes

Why does this request need to be actioned urgently? * 0 / 255

- If a client is receiving Support at Home or combination of Support at Home and Commonwealth Home Support Programme (CHSP) services, it is mandatory for a care plan and budget to be attached to the review request. The request cannot be submitted without this information.

! A provider may receive a request from the My Aged Care contact centre where they have received a web referral request from a health professional for a clinical aged care needs reassessment for an existing Support at Home participant.

The Support at Home providers should review the client's situation, care plan and budget and if a reassessment is required for change to Support at Home classification and/or priority, submit the support plan review request to the assessor.

If the provider is not proceeding with the support plan review request as the client is already supported by the existing Support at Home classification, they should liaise with the health professional to advise them why the reassessment request is not proceeding.

Support at Home and Commonwealth Home Support Programme
 Flexible Care
 Residential Care

Primary reason for Support Plan Review Request*

Request for additional CHSP services or changes to CHSP services for clients who are only receiving CHSP services currently
 Request for additional CHSP services for clients who are in receipt of a HCP
 There is a change in client's circumstances and they have an immediate need for access to Support at Home services
 There is a significant change in the client's needs and additional Aged Care Act 2024 (the Act) based aged care services are required

Please identify what services the client is currently receiving. * ?

Please provide a copy of the client's care plan and individualised budget. ?

ADD CARE PLAN
ADD BUDGET

7. Select the **Browse** button to choose a document for upload. Complete all mandatory fields and select **UPLOAD** to complete.

Add a care plan

Please note: Some attachments will be viewable by other people with authorised access to this client record. Please refer to your portal guide for details.

All fields marked with an asterisk (*) are required.
You can upload files up to 5 MB to this record. The following file types are accepted:
.jpeg, .jpg, .bmp, .png, .docx, .xlsx, .pdf, .rtf, .txt *

File: *
\\central.health\dfsuseren Browse...

Name of the attachment: *
Care Plan

Type of document: *
SP Care Plan

Please provide a short description about the contents of the attachment, e.g. assessment date and time
(250 characters)
0 / 250

UPLOAD CANCEL

Once the documents are successfully uploaded, they will display in the review request.

Selecting on the rubbish bin icon next to the attachment name will delete the attachment.

! A confirmation message will not be displayed.

Primary reason for Support Plan Review Request*

Request for additional CHSP services or changes to CHSP services for clients who are only receiving CHSP services currently

Request for additional CHSP services for clients who are in receipt of a HCP

There is a change in client's circumstances and they have an immediate need for access to Support at Home services

There is a significant change in the client's needs and additional Aged Care Act 2024 (the Act) based aged care services are required

Please identify what services the client is currently receiving. * ?

Please provide a copy of the client's care plan and individualised budget. ?

Care plan: Care Plan.docx

Individualised budget: Budget.docx

8. Once all mandatory fields have been completed, tick **I have reviewed the information on this page, and I confirm that it is correct** then continue to **SEND REVIEW REQUEST**.

A confirmation will display if the request is submitted successfully.

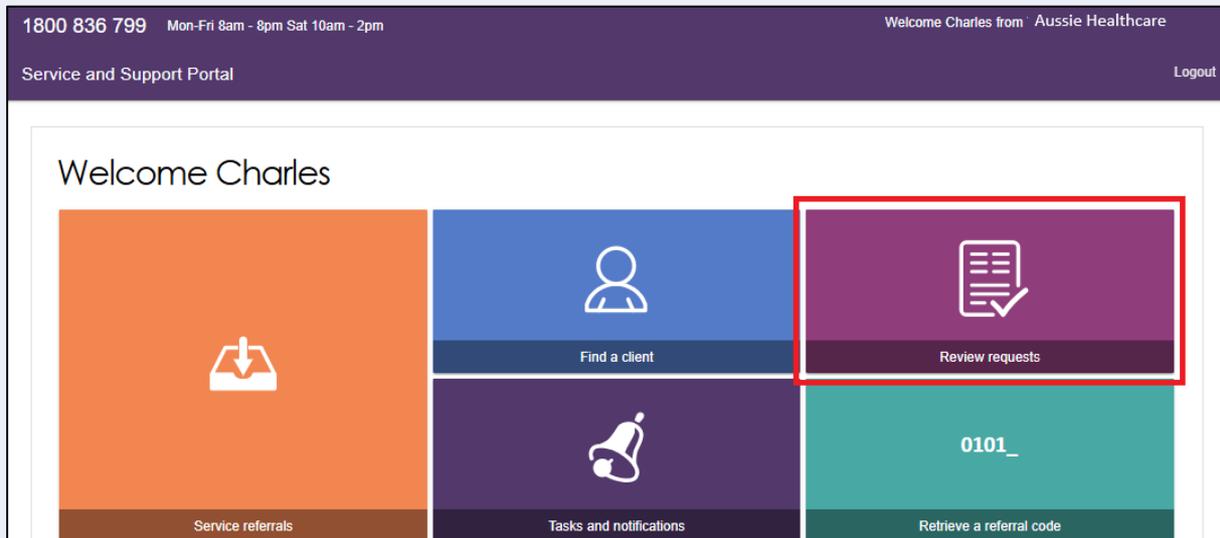
I have reviewed the information on this page and I confirm that it is correct. *

SEND REVIEW REQUEST CANCEL

5.6.4 Checking the status of a Support Plan Review

1. If a client, provider or aged care needs assessor has requested that a client's support plan be reviewed, it will be referred to an aged care needs assessor to complete. A service provider staff member with the *team leader* role is then able to check the status of this review via the Service and Support portal.

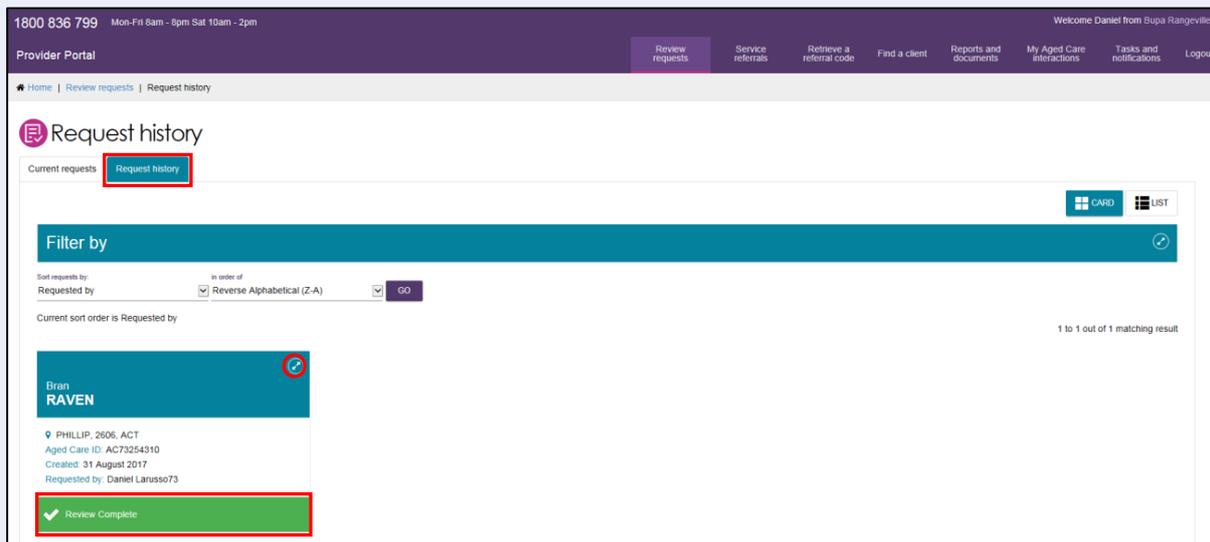
This can be done by selecting the **Review requests** tile.



2. On the **Review requests** page, select the **Request history** tab to view the status of any reviews.

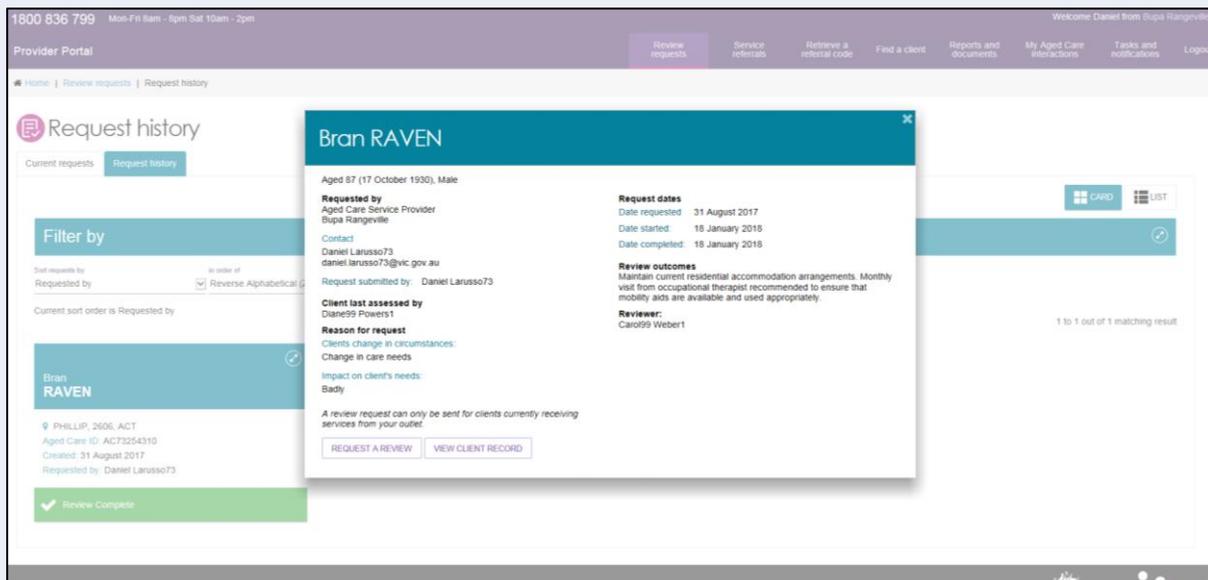
If a review has recently been conducted, there will be a green **Review complete** bar across the bottom of the client record.

Select the  icon to expand the card to view details of the request in more detail.



3. You will then be able to view the outcomes of the review.





Depending on the outcome, you may need to make changes to the way you deliver services. Information is recorded on the client record to assist providers in understanding what or if any changes need to be made to better support the client.

The outcome of a review by an aged care needs assessor may be:

- no change
- an increase or decrease in services within the scope of the current approval
- a referral to for a comprehensive assessment for services under the *Aged Care Act 2024*.

Where the review outcome affects the current delivery of services to the client, the aged care needs assessor may contact the service provider and discuss the results of the review and the recommendations that apply to that provider's services.

If the support plan review results in an increase or decrease in services, the provider should update the service delivery information in the client record.

Where a new assessment is initiated and results in a different service type being approved, the provider will be either:

- notified that they have a new referral to accept in the Portal (or in the case of Support at Home Classifications, they will have to wait until the client is assigned a classification), or
- contacted by the client to discuss arrangements for ceasing care with that provider (for example if the current provider is unable or not approved to provide the type of care for the new referral).

Funding and classification details are assigned at the point of service recommendation and are visible in the client record.

6. Generating reports and accessing forms

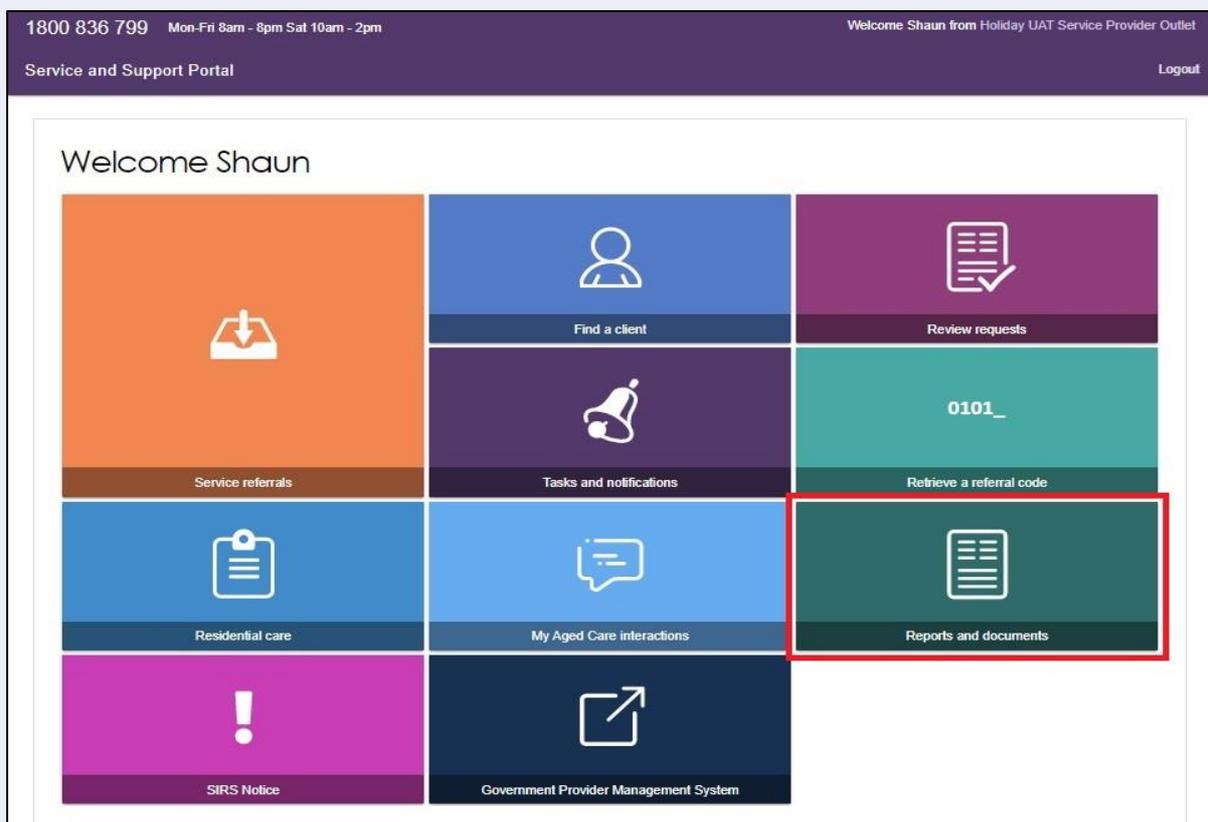
Providers can generate reports and access forms via the Service and Support Portal.

You are also able to use the **Reports** feature to print documents, including completed Integrated Assessment Tool (IAT) PDF reports and client record PDFs.

6.1 Generating reports

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 documents** page will be displayed.



2. The **Reports and documents** page features a **Reports** tab, a **Forms** tab and a **Links** tab. The **Reports** tab displays a list of **Recently Requested Reports** and **Reports**.

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

The Workload Management report is available from the **Reports** tab.

Reports and documents

Reports Forms Links

My Reports

Name	Requested Date	Status
No Records found		

Reports List

Name	Description	Formats
Service Provider Workload Management		PDF
BUSINESS INTELLIGENCE REPORTS		

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

Reports and documents

Reports Forms Links

My Reports

Name	Requested Date	Status
No Records found		

Reports List

Name	Description	Formats
Service Provider Workload Management		PDF
BUSINESS INTELLIGENCE REPORTS		

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**.

Generate report

Reports Forms Links

All fields marked with an asterisk (*) must be completed before submission

Service Provider Workload Management

Outlet:

Status:

Start Date:
(e.g. dd/mm/yyyy)

End Date:
(e.g. dd/mm/yyyy)

Service Type:

Service Sub Type:

Priority:

Output Type: *

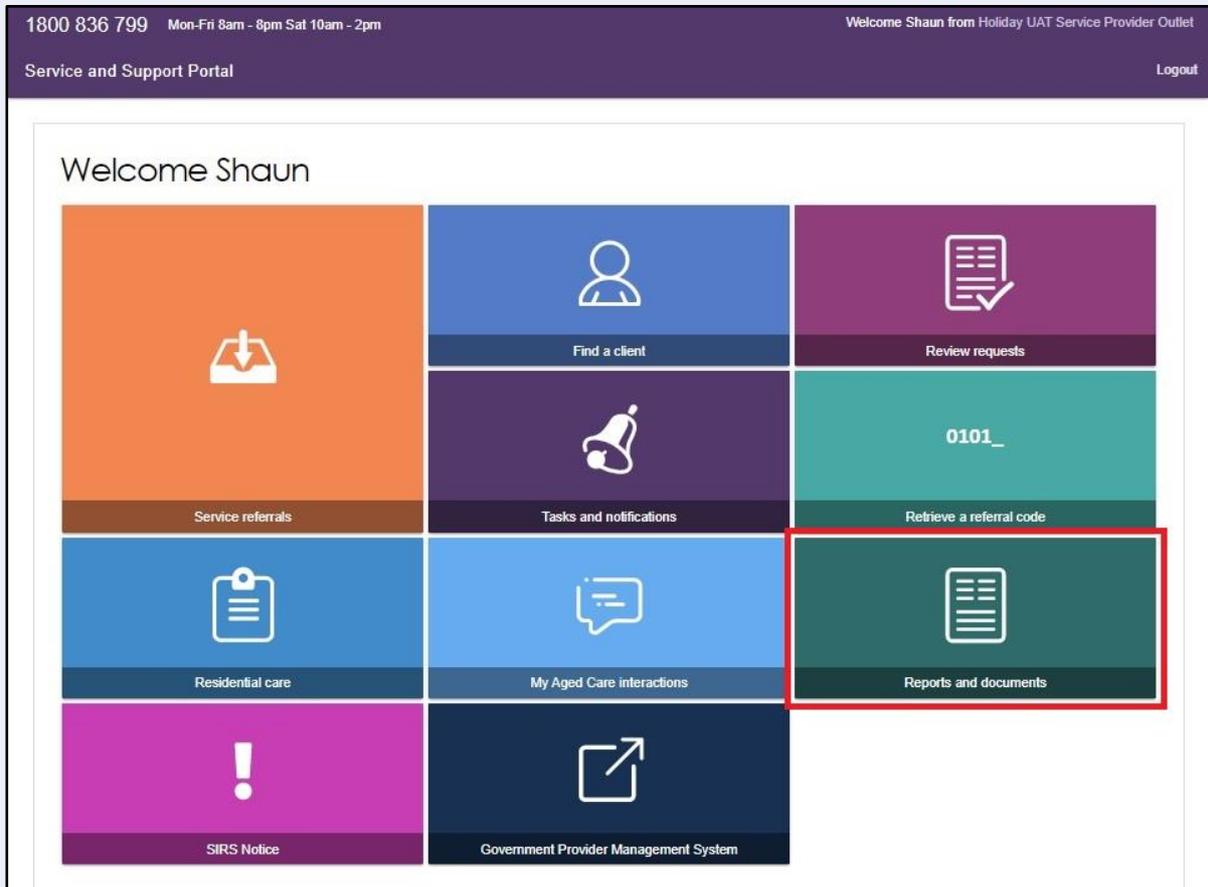
REQUEST REPORT CANCEL



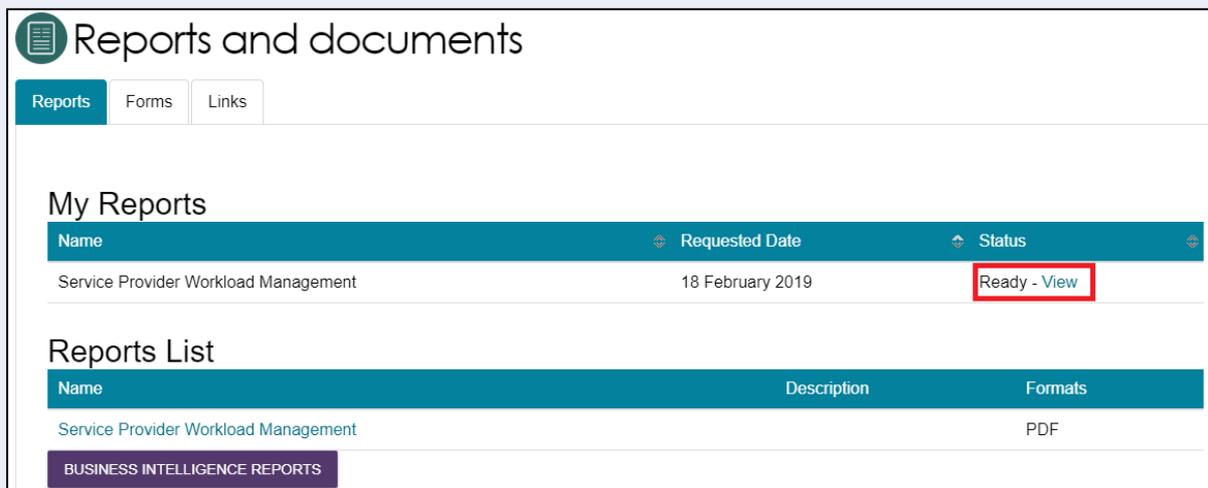
6.2 Viewing reports

Follow these steps to view reports:

1. Select **Reports and documents** from the homepage. The **Reports and Documents** page will be displayed.



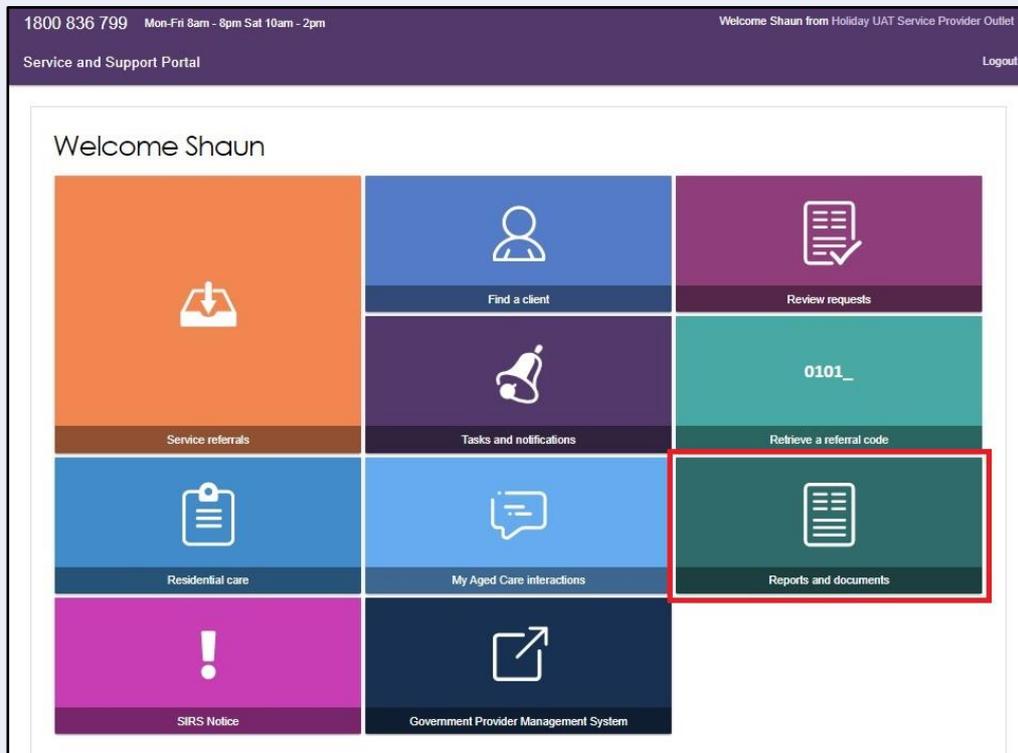
2. In the My Reports section, select **View** beside the report you would like to view.



6.3 Accessing forms

Follow these steps to access forms.

1. Select **Reports and Documents** from the homepage.



2. Select the **Forms** tab. A list of all forms available will be displayed.



7. Serious Incident Response Scheme (SIRS)

SIRS notifications can be created, viewed and managed at the individual user level by users assigned the Staff Member or Team Leader role in the Service and Support Portal if they have been assigned the SIRS role by the Organisation Administrator.

Detailed instructions on SIRS functions can be found in [Service and Support Portal User Guide - Serious Incident Response Scheme \(SIRS\) Portal](#)



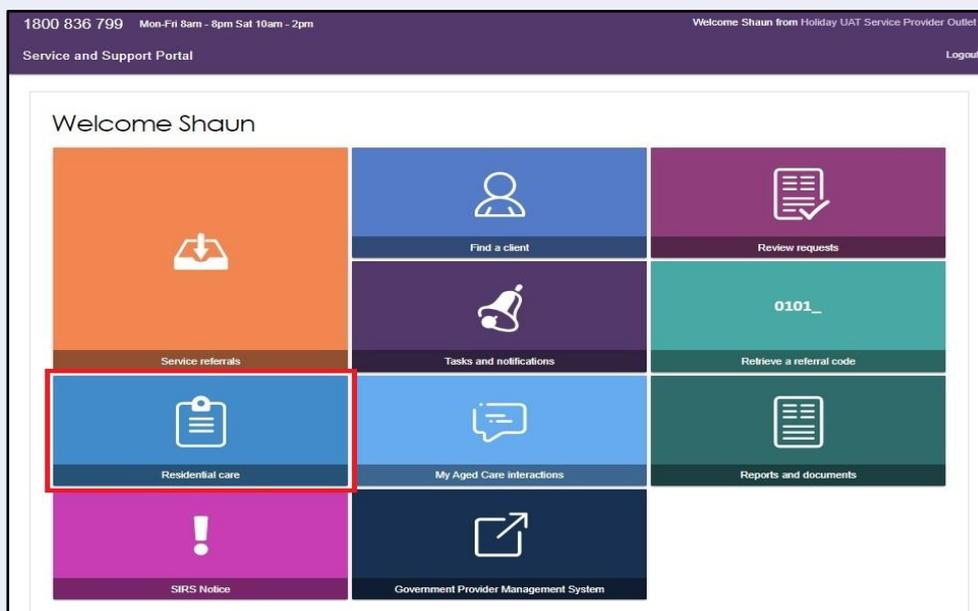
8. Residential Client Classifications and Reassessments

Residential Providers with the role of Team Lead or Staff Member can view the **Residential Care** Tile. By selecting the **Residential Care** tile, you can navigate to 3 tabs:

- The **Care Recipient** tab will list all clients receiving residential permanent and respite care.
- The **Requests** tab will contain a list of all current and historical requests for initial assessments, reassessments and reconsiderations.
- The **Palliative Care** tab will contain a list of clients that were entered into permanent residential services for palliative care.

8.1 Viewing residential clients and their residential funding classification

1. On the **Home** screen, select the **Residential Care** tile.



The **Care Recipient** tab will list all clients receiving permanent residential care and details of their residential funding classification.

Home | Residential care

Residential care

Care recipients | Requests | Palliative Care

Filter by

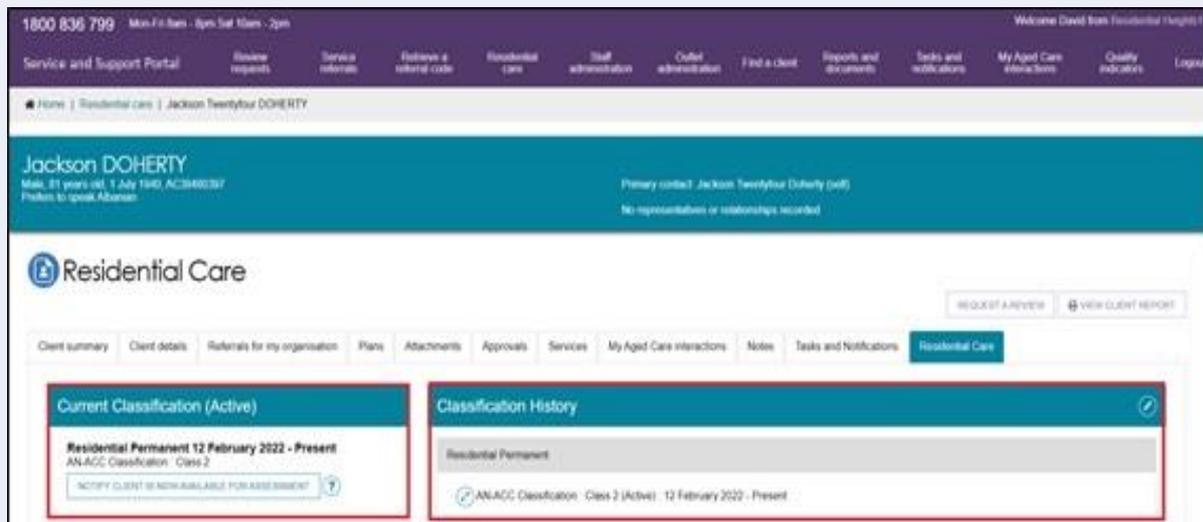
1 to 50 out of 61 matching results

Last Name	First Name	Aged Care User ID	Assessment Date	Classification	Effective Date	Status	Request type	Service
BOISCLAIR	Philip	AC70226580				No Classification		HammondCare - Wairoonga
BOISCLAIR	Perry	AC53490892	22 September 2021	Class 7	22 September 2021	Active		HammondCare - Wairoonga
BOISCLAIR	Lloyd	AC54971312				No Classification		HammondCare - Wairoonga
BOUY	Will	AC92181908				No Classification		HammondCare - Wairoonga
CATRONE	James	AC10064384	22 September 2021	Class 4	22 September 2021	Active	Reassessment	HammondCare - Wairoonga
CATRONE	Horace	AC80912652				No Classification		HammondCare - Wairoonga
CATRONE	Ben	AC66750803				No Classification		HammondCare - Wairoonga
CATRONE	Otto	AC89068328				No Classification		HammondCare - Wairoonga
CATRONE	Alvin	AC08910150				No Classification		HammondCare - Wairoonga
CONLAN	Will	AC06373302				No Classification		HammondCare - Wairoonga



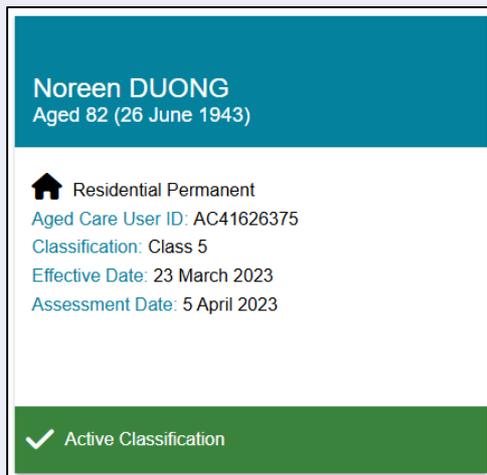
The **Request Type** column displays information when the care recipient has an in-progress palliative care status form approval, initial assessment, reassessment or reconsideration.

2. Selecting a client will navigate to the client's current and historical classification(s).

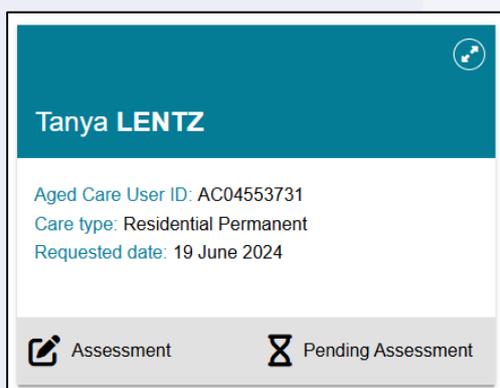


Residential funding classifications can appear in the following different ways:

- **Active** indicates that the client has had a Residential Funding Assessment and has an active classification associated with their record.



- **Pending** indicates that a Residential Funding assessment has been completed and is pending a classification status. This pending status will be displayed for 1 day after assessment completion or when the assessment is uploaded.



- **Default Classification** indicates that a Residential Funding Assessment is yet to be completed for this client. Clients with default classifications can be distinguished from clients with assessed classifications by their classification code. Most residential permanent care clients with a default class will be coded **Class 99**, while those who entered to receive palliative care and have not yet been confirmed as eligible will be **Class 98**. The default classification for residential respite care clients is **Class 100**.

Emanuel MONROE
Aged 77 (5 December 1947)

Residential Permanent
Aged Care User ID: AC36465862
Classification: Class 99
Effective Date: 7 June 2024

Assessment in progress

Active Classification

8.2 Filtering the Care Recipients lists

The Care Recipients list can be filtered using Last Name, First Name, Request Type or Aged Care User ID. You can also select **ADVANCED SEARCH** to reveal additional criteria to filter with, such as Classification.

1. Expand the **Filter by** section.

The screenshot shows the 'Residential care' page with the 'Filter by' section expanded. The table below shows the results of the search.

Last Name	First Name	Aged Care User ID	Care Type	Classification	Effective Date	Status	Request type	Service
BOUY	Winfield	AC88334438	Residential Permanent	Class 1	30 December 2021	Active Classification	Palliative Care	Zeera Aged Care home
CRAYFORD	Arthur	AC90810102	Residential Permanent	Class 5	3 March 2022	Active Classification	Reassessment	Zeera Aged Care home
EIGHTYUAT	May	AC30307730	Residential Permanent	Class 99	16 January 2022	Active Classification		Zeera Aged Care home
ELMER	Jammi	AC30632368	Residential Permanent	Class 7	9 March 2022	Active Classification	Reassessment	Zeera Aged Care home

Enter search criteria and select the **FILTER** button.

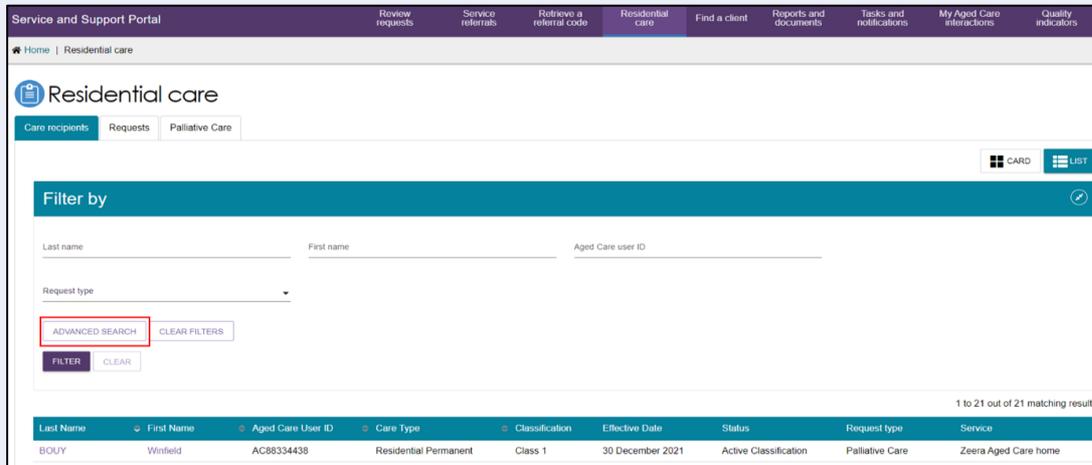
The screenshot shows the 'Residential care' page with the 'Filter by' section expanded. The search criteria entered are: Last name: BOUY, First name: Winfield, Aged Care user ID: AC88334438, and Request type: Palliative Care. The 'FILTER' button is highlighted with a red box.



8.2.1 Advanced Search

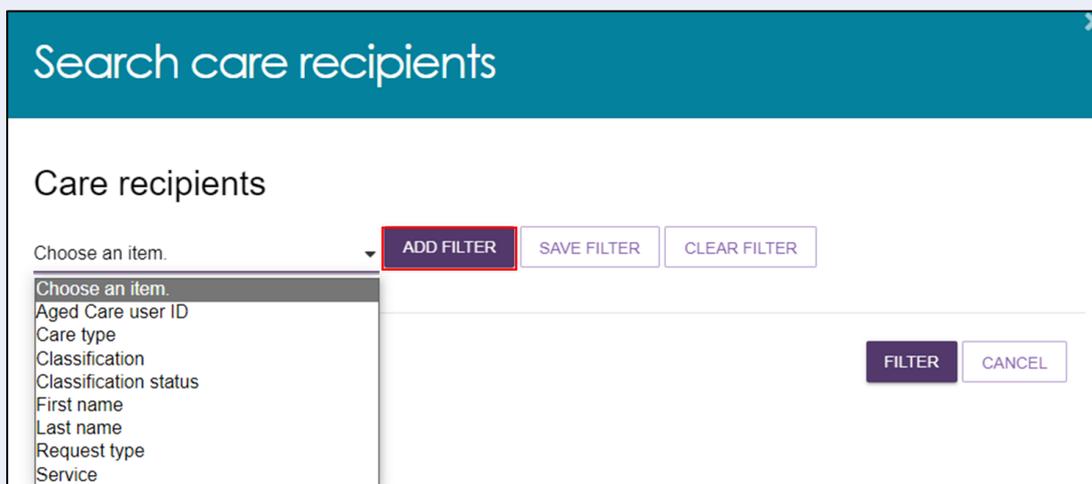
Use **Advanced Search** to use other criteria to search the care recipients list. Up to seven filters can be used to refine search results.

1. Select **ADVANCED SEARCH**



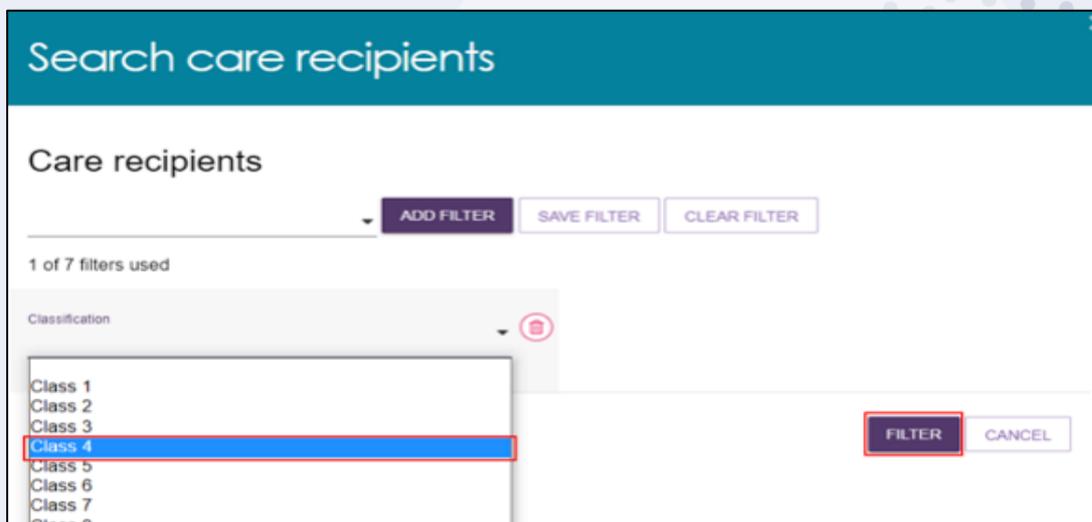
The screenshot shows the 'Residential care' interface with a navigation bar at the top. Below the navigation bar, there are tabs for 'Care recipients', 'Requests', and 'Palliative Care'. A 'Filter by' section is visible, containing input fields for 'Last name', 'First name', and 'Aged Care user ID'. Below these fields, there is a 'Request type' dropdown menu. A red box highlights the 'ADVANCED SEARCH' button, with 'CLEAR FILTERS' to its right. Below the buttons, there are 'FILTER' and 'CLEAR' buttons. At the bottom right of the filter section, it says '1 to 21 out of 21 matching results'. Below the filter section, there is a table with columns: Last Name, First Name, Aged Care User ID, Care Type, Classification, Effective Date, Status, Request type, and Service. The first row of data is: BOUY, Winfield, AC88334438, Residential Permanent, Class 1, 30 December 2021, Active Classification, Palliative Care, Zeera Aged Care home.

2. Choose the item you wish to add e.g. classification and select **ADD FILTER**.



The screenshot shows a 'Search care recipients' dialog box. The title bar is teal with a close button. Below the title bar, the text 'Care recipients' is displayed. A dropdown menu is open, showing a list of items: 'Choose an item.', 'Aged Care user ID', 'Care type', 'Classification', 'Classification status', 'First name', 'Last name', 'Request type', and 'Service'. A red box highlights the 'ADD FILTER' button, with 'SAVE FILTER' and 'CLEAR FILTER' buttons to its right. Below the dropdown menu, there are 'FILTER' and 'CANCEL' buttons.

3. Select a classification (e.g. Class 4) and select the **FILTER** button. The Care Recipient list is now filtered accordingly.



The screenshot shows the 'Search care recipients' dialog box. The title bar is teal with a close button. Below the title bar, the text 'Care recipients' is displayed. A dropdown menu is open, showing a list of items: 'Choose an item.', 'Aged Care user ID', 'Care type', 'Classification', 'Classification status', 'First name', 'Last name', 'Request type', and 'Service'. A red box highlights the 'ADD FILTER' button, with 'SAVE FILTER' and 'CLEAR FILTER' buttons to its right. Below the dropdown menu, there are 'FILTER' and 'CANCEL' buttons. Below the dialog box, the text '1 of 7 filters used' is displayed. Below this text, there is a dropdown menu for 'Classification' with a red box around it. The dropdown menu is open, showing a list of items: 'Class 1', 'Class 2', 'Class 3', 'Class 4', 'Class 5', 'Class 6', 'Class 7', and 'Class 8'. A red box highlights 'Class 4'. Below the dropdown menu, there are 'FILTER' and 'CANCEL' buttons.



- You can select **SAVE FILTER** for future use or **CLEAR FILTER** to start again.

- Once the filters are applied, you will be able to view the number of clients that fit within the category.

Last Name	First Name	Aged Care User ID	Assessment Date	Classification	Effective Date	Status	Request type	Service
SMITH	John	AC12345678	13 April 2021	Class 4	13 April 2021	Active		Aged Care Service 1
CITIZEN	Jane	AC123456798	15 June 2021	Class 4	15 June 2021	Active		Aged Care Service 1

8.3 Requesting Residential Funding Reassessments

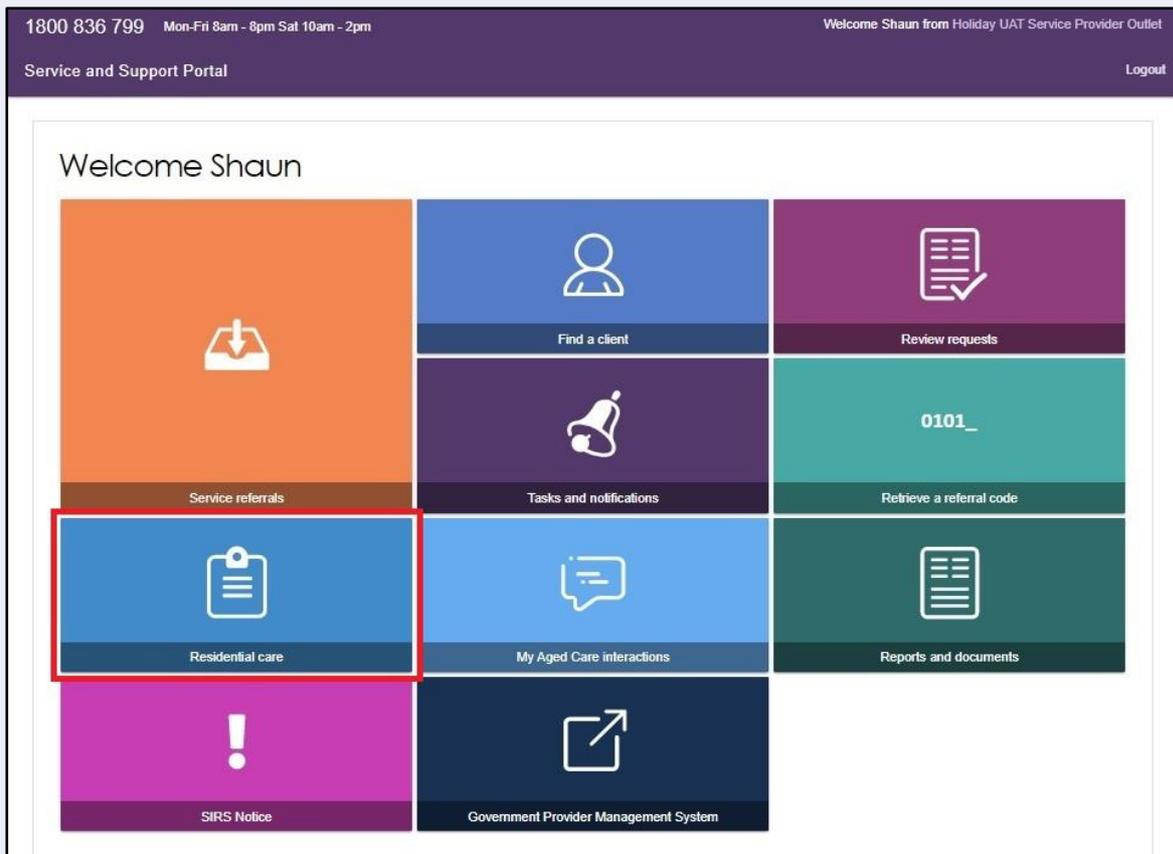
! Residential Funding Reassessments should only be requested if the client's care needs have significantly changed.

Reassessment requests can only be requested for clients whilst in your care.

Reassessment requests can only be made by users assigned Team Lead access.

- On the **Home** screen, select the **Residential Care** tile.





2. On the **Care Recipients** screen, select the client that requires a reassessment.

! You cannot request a reassessment when the client has an initial assessment, reassessment or reconsideration in-progress. Check the **Requests** tab for in-progress assessments.

Home | Residential care

Residential care

Care recipients | Requests | Palliative Care

CARD LIST

Filter by

1 to 21 out of 21 matching results

Last Name	First Name	Aged Care User ID	Care Type	Classification	Effective Date	Status	Request type	Service
BOUY	Winfield	AC8834438	Residential Permanent	Class 1	30 December 2021	Active Classification	Palliative Care	Zeera Aged Care home
CRAYFORD	Arthur	AC90810102	Residential Permanent	Class 5	3 March 2022	Active Classification		Zeera Aged Care home
EIGHTYUAT	May	AC30307730	Residential Permanent	Class 99	16 January 2022	Active Classification		Zeera Aged Care home
ELMER	Jarrod	AC30632368	Residential Permanent	Class 7	9 March 2022	Active Classification		Zeera Aged Care home
FLORNING	Kaira	AC75486001	Residential Respite	Class 101	25 May 2022	Active Classification		Zeera Aged Care home
IANNI	Franklin	AC11970019	Residential Permanent	Class 3	1 June 2022	Active Classification	Client Unavailable	Zeera Aged Care home

On the **Client Record** screen, within the **Residential Care** tab you can view the client's current Residential Permanent and/or Respite Classification and request a reassessment for the client:

- For residential permanent reassessment requests, select the **REQUEST REASSESSMENT** button where the current residential permanent classification is shown.



- For residential respite reassessment requests, select the **REQUEST REASSESSMENT** button where the current residential respite classification is shown.

Home | Residential care | Arthur CRAYFORD

Mr Arthur CRAYFORD
Female, 91 years old, 5 March 1931, AC90810102
PRIMBEE, NSW, 2502
Prefers to speak Italian

Residential Care

Client summary | Client details | Referrals for my organisation | Plans | Attachments | Approvals | Services | My Aged Care interactions | No

Current Classification (Active)

Residential Permanent 3 March 2022 - Present
AN-ACC Classification : Class 5

REQUEST REASSESSMENT ?

REQUEST RECONSIDERATION ?

Residential Respite 25 March 2014 - Present
AN-ACC Classification : Class 101

REQUEST REASSESSMENT ?

REQUEST RECONSIDERATION ?

Classification History

Residential Permanent

AN-ACC Classification : Class 5 (

AN-ACC Classification : Class 9 (

Residential Respite

AN-ACC Classification : Class 10

3. Select **Yes** if there has been a significant change in care needs.

Then, select **CONFIRM REASSESSMENT** button.

For Residential Permanent requests only: you can also request it to be **Urgent**, if the care recipient is at imminent end of life and has a documented care plan in place that has been communicated with the resident and their family and/or carers.

Confirm reassessment request

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

Please ensure that the care recipient you are requesting a reassessment for has displayed a significant change in care needs.

Has there been a significant change in care needs?*

Yes

No

Is the care recipient approaching end of life with a documented care plan in place that has been communicated with the resident, their family and/or carers? Note: Evidence of a care plan with end of life care activities may be requested by an AN-ACC assessor at the time of assessment.

By selecting 'yes' you are requesting an urgent reclassification assessment and advising that the care recipient is approaching end of life.*

Yes

No

CONFIRM REASSESSMENT CANCEL

Select the criteria the client meets for reassessment, then select the **REQUEST REASSESSMENT** button.

For reassessments of residential permanent clients, if the time based criteria is not met, the criteria will be displayed in light grey text and cannot be selected.

For residential respite clients, the expected departure date from residential respite care is required.

RESIDENTIAL PERMANENT EXAMPLE:

Home | Residential care | Jarrod ELMER (VonRueden) | Request Reassessment

Mr Jarrod N ELMER (VonRueden)
 Male, 76 years old, 28 July 1946, AC30632368
 15 LIMBURG WAY GREENWAY, ACT, 2900
 Identifies as Aboriginal

Primary contact: Jarrod Elmer (self) - 61 2987 1234
 No support relationships recorded

Request reassessment

[VIEW CLIENT REPORT](#)

All fields marked with an asterisk (*) must be completed before submission
 Please select relevant criteria to your reassessment request *

- Care recipient has been an in-patient of a hospital for at least 5 days consecutively
- Care recipient has been an in-patient of a hospital for at least 2 days and was administered general anaesthetic during this period
- For a care recipient with an existing classification between 9 and 13, at least 6 months have passed since the result of the existing classification
- For a care recipient with an existing classification level between 2 and 8, at least 12 months have passed since the result of the existing classification
- The condition of the care recipient relating to mobility, cognitive ability, function, pressure sore risk and/or compounding factors has changed

Further justification

0 / 1000

[REQUEST REASSESSMENT](#) [CANCEL](#)

RESIDENTIAL RESPITE EXAMPLE:

Request reassessment

All fields marked with an asterisk (*) must be completed before submission
 Please select relevant criteria to your respite reassessment request *

- Condition of care recipient has changed from independently mobile to being mobile only with assistance
- Condition of care recipient has changed from independently mobile to not mobile
- Condition of care recipient has changed from mobile with assistance to not mobile

Further justification

0 / 1000

Expected departure date * 
 (e.g. dd/mm/yyyy)

[REQUEST REASSESSMENT](#) [CANCEL](#)

4. The reassessment has been successfully requested when a green banner (below) is shown. There is also a banner at the top of the screen, and it notifies the timeline of when new classification details are expected to appear.

Residential Care [VIEW CLIENT REPORT](#)

Classification details for clients in your care will be displayed within 1 business day(s) of a residential funding assessment being completed. If you are unable to see a classification, please check back after 1 day(s).

Client summary | Client details | Support network | Referrals for my organisation | Plans | Attachments | Approvals | Services | My Aged Care interactions | Notes

Tasks and Notifications | **Residential Care**

Current Classification (Active)

Residential Respite 8 September 2023 - Present
 AN-ACC Classification : Class 101

[REQUEST REASSESSMENT](#) ?

[REQUEST RECONSIDERATION](#) ?

Classification History

Residential Respite

 AN-ACC Classification : Class 101 (Active) : 8 September 2023 - Present

Accessibility | Privacy | Disclaimer | Terms of use | Copyright © Commonwealth of Australia ABN  Reassessment has been successfully requested. Australian Government Department of Health myagedcare



The progress of reassessment requests can be viewed on the **Requests** tab, for more details refer to [Request Tab and Request Status Definitions](#).

Notifications are generated about new classification decisions after the assessment is completed, for more details refer to [Viewing Tasks and Notifications](#).

! Residential funding reconsiderations should only be requested if you do not agree with the classification that has resulted from an assessment or reassessment.

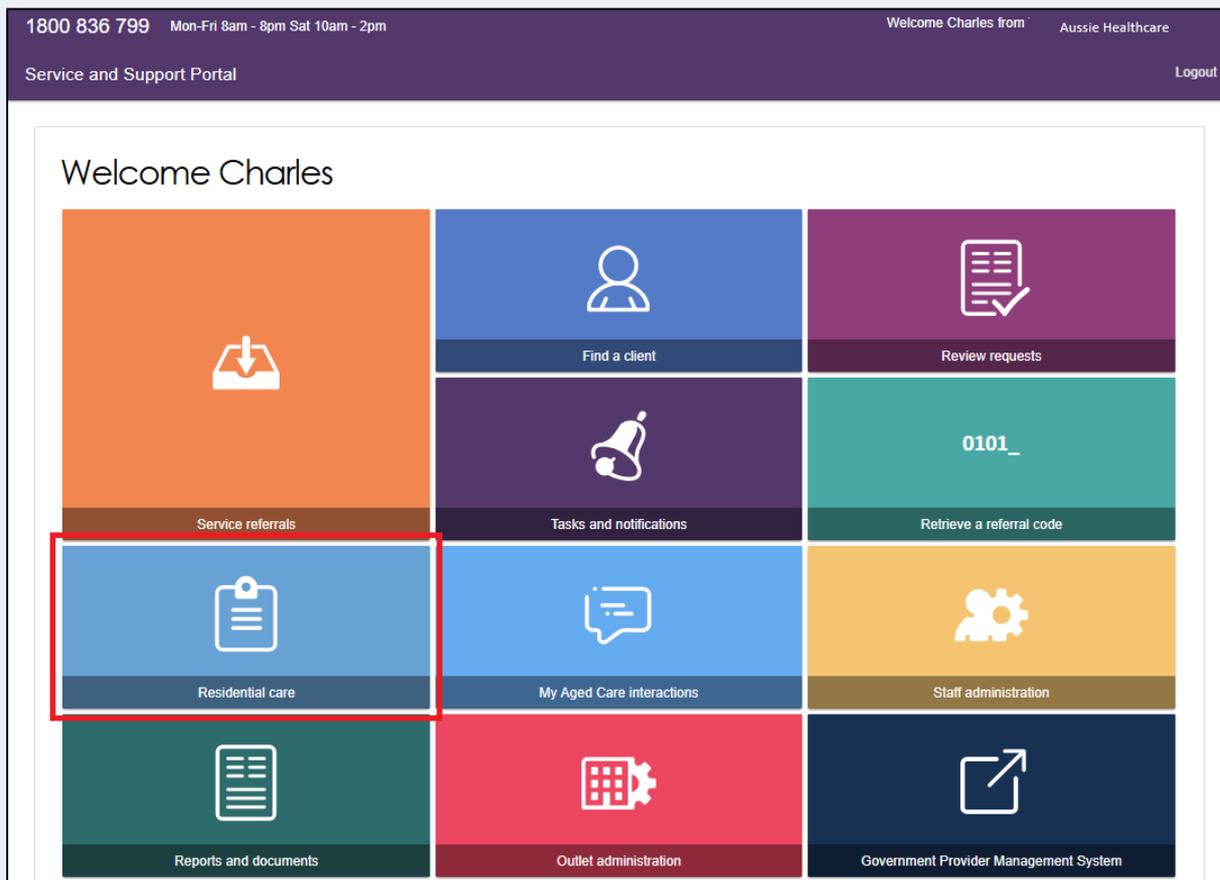
Reconsiderations must be requested within 28 days of being notified about the new classification.

Reconsideration requests can only be raised while the client is in your care.

Reconsideration requests can only be raised by users assigned Team Lead access.

8.4 Requesting Residential Funding Reconsiderations

1. On the **Home** screen, select the **Residential Care** tile.



2. On the **Care Recipients** screen, select the client whose classification requires reconsideration.

! You cannot request a reconsideration if the client has an initial assessment, reassessment or reconsideration in-progress. Check the **Requests** tab for in-progress assessments.



Home | Residential care

Residential care

Care recipients | Requests | Palliative Care

CARD LIST

Filter by

1 to 21 out of 21 matching results

Last Name	First Name	Aged Care User ID	Care Type	Classification	Effective Date	Status	Request type	Service
BOUY	Winfield	AC88334438	Residential Permanent	Class 1	30 December 2021	Active Classification	Palliative Care	Zeera Aged Care home
CRAYFORD	Arthur	AC90810102	Residential Permanent	Class 5	3 March 2022	Active Classification		Zeera Aged Care home
EIGHTYUAT	May	AC30307730	Residential Permanent	Class 99	16 January 2022	Active Classification		Zeera Aged Care home
ELMER	Jarrod	AC30632368	Residential Permanent	Class 7	9 March 2022	Active Classification		Zeera Aged Care home
FLORNING	Kaira	AC75486001	Residential Respite	Class 101	25 May 2022	Active Classification		Zeera Aged Care home
IANNI	Franklin	AC11970019	Residential Permanent	Class 3	1 June 2022	Active Classification	Client Unavailable	Zeera Aged Care home

3. On the **Client Record** screen, within the **Residential Care** tab you will be able to view the client's current Residential Permanent and/or Respite Classification and request a reconsideration:
- For residential permanent reconsiderations requests, select the **REQUEST RECONSIDERATION** button where the current residential permanent classification is shown.
 - For residential respite reconsideration requests, select the **REQUEST RECONSIDERATION** button where the current residential respite classification is shown.

Home | Residential care | Arthur CRAYFORD

Mr Arthur CRAYFORD
Female, 91 years old, 5 March 1931, AC90810102
PRIMBEE, NSW, 2502
Prefers to speak Italian

Residential Care

Client summary | Client details | Referrals for my organisation | Plans | Attachments | Approvals | Services | My Aged Care interactions | No

Current Classification (Active)

Residential Permanent 3 March 2022 - Present
AN-ACC Classification : Class 5

REQUEST REASSESSMENT ?

REQUEST RECONSIDERATION ?

Residential Respite 25 March 2014 - Present
AN-ACC Classification : Class 101

REQUEST REASSESSMENT ?

REQUEST RECONSIDERATION ?

Classification History

Residential Permanent

AN-ACC Classification : Class 5 (

AN-ACC Classification : Class 9 (

Residential Respite

AN-ACC Classification : Class 10

Select **Yes** if you disagree with the current classification and select the **CONFIRM RECONSIDERATION** button.

For Residential Permanent requests only: you can also request it to be **Urgent**, if the care recipient is at imminent end of life and has a documented care plan in place that has been communicated with the resident and their family and/or carers.



Confirm reconsideration request ✕

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

You are requesting a reconsideration for a care recipient who has had an assessment/reassessment within the last 28 days.

Do you disagree with the classificaton resulting from the assessment of the care recipient?*

Yes

No

Is the care recipient approaching end of life with a documented care plan in place that has been communicated with the resident, their family and/or carers? Note: Evidence of a care plan with end of life care activities may be requested by an AN-ACC assessor at the time of assessment.

By selecting 'yes' you are requesting an urgent reclassification assessment and advising that the care recipient is approaching end of life.*

Yes

No

CONFIRM RECONSIDERATION

CANCEL

4. Select the criteria for your reconsideration request, then select **REQUEST RECONSIDERATION.**

[Home](#) | [Residential care](#) | [Marge SIMPSON](#) | [Request Reconsideration](#)

Mrs Marge SIMPSON
Female, 69 years old, 12 September 1953, AC47832407
 750 EVERGREEN TERRACE SPRINGFIELD, QLD, 4212

Primary contact: Marge Simpson (self) - 02 3555 3543
 No support relationships recorded

Request reconsideration

All fields marked with an asterisk (*) must be completed before submission

Please select relevant criteria to your reconsideration request *

The assessor did not complete the assessment in a satisfactory manner, resulting in an inaccurate classification

The care recipient's condition during the assessment did not accurately reflect their usual condition or relevant information was not considered, resulting in an inaccurate classification

Further justification

REQUEST RECONSIDERATION

CANCEL

For reconsideration of residential respite clients, the expected departure date from residential respite care is required.

Request reconsideration

All fields marked with an asterisk (*) must be completed before submission

Please select relevant criteria to your reconsideration request *

The care recipient's condition during the assessment did not accurately reflect their usual condition or relevant information was not considered, resulting in an inaccurate classification.

The assessor did not complete the assessment in a satisfactory manner, resulting in an inaccurate classification.

Further justification

Expected departure date *

(e.g. dd/mm/yyyy)

REQUEST RECONSIDERATION

CANCEL



5. The reconsideration has been successfully requested when a green banner appears.



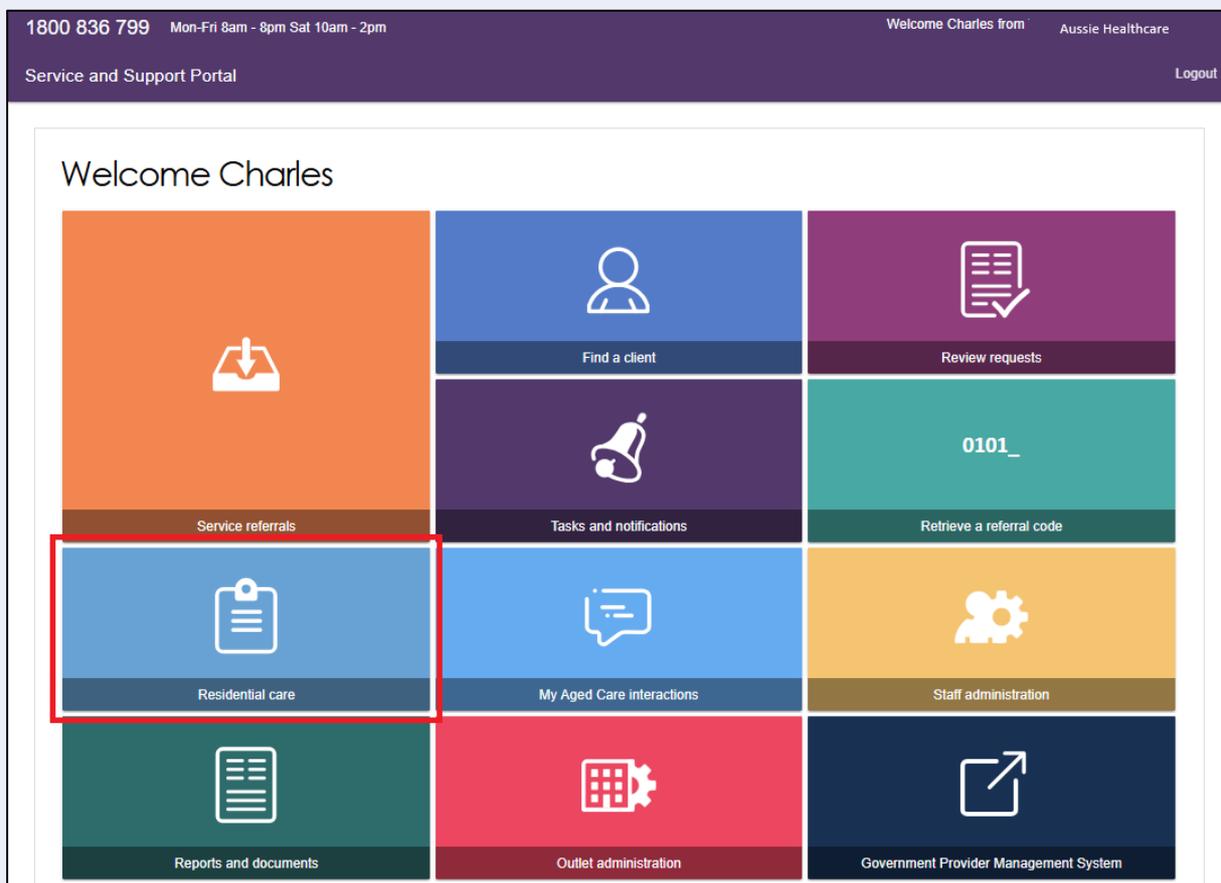
The progress of reconsideration requests can be viewed on the **Requests** tab, for more details refer to section [Request Tab and Request Status Definitions](#).

Notifications are generated about new classification decisions after the assessment is completed, for more details refer to [Viewing tasks and notifications](#).

8.5 Recalling a Residential Funding Reassessment or Reconsideration request

If you have incorrectly requested a reassessment for a client, or you have become aware that a client is no longer available for reassessment (for example, they are on social/emergency leave) you are able to recall your request.

1. On the **Home** screen, select the **Residential Care** tile.



2. From the **Requests** tab, scroll or filter the list to find the client reassessment or reconsideration request that you wish to recall and expand the client.



Service and Support Portal

Review requests Service referrals Retrieve a referral code Residential care Find a client Reports and documents Tasks and notifications My Aged Care interactions Quality indicators

Home | Residential care

Horton House and Warmington Lodge

<p>Marge SIMPSON</p> <p>Aged Care User ID: AC47832407 Care type: Residential Permanent Requested date: 18 September 2022</p> <p>Reconsideration Pending Allocation</p>	<p>UATClementina UATRESPITEMARIAM</p> <p>Aged Care User ID: AC17135526 Care type: Residential Respite Requested date: 16 September 2022</p> <p>Assessment Pending Assessment</p>	<p>UATAmiya UATRESPITESCHIMMEL</p> <p>Aged Care User ID: AC93887099 Care type: Residential Respite Requested date: 16 September 2022</p> <p>Assessment Pending Assessment</p>	<p>UAT Santos UATRESPITELYNCH</p> <p>Aged Care User ID: AC76486422 Care type: Residential Respite Requested date: 16 September 2022</p> <p>Assessment Pending Assessment</p>
<p>UATLiam UATJUANA</p> <p>Aged Care User ID: AC94291648 Care type: Residential Respite Requested date: 16 September 2022 Closed date: 16 September 2022</p>	<p>UATQuitzon UATBRICE</p> <p>Aged Care User ID: AC66134917 Care type: Residential Respite Requested date: 15 September 2022</p>	<p>UATQuitzon UATBRICE</p> <p>Aged Care User ID: AC66134917 Care type: Residential Permanent Requested date: 15 September 2022 Closed date: 15 September 2022</p>	<p>UATLiam UATJUANA</p> <p>Aged Care User ID: AC94291648 Care type: Residential Respite Requested date: 15 September 2022 Closed date: 15 September 2022</p>

- A pop-up will appear where you can select the **RECALL REASSESSMENT REQUEST** or **RECALL RECONSIDERATION REQUEST** button.

Bobby GILDA

Aged 81 (1 July 1940), Male

Classification details	Referral details
Care type: Residential Permanent	Referral channel: Provider Initiated
	Request type: Reassessment
	Requested by: BL_TX117862

VIEW RESIDENTIAL CARE AND CLIENT RECORD **RECALL REASSESSMENT REQUEST**

Marge SIMPSON

Aged 69 (12 September 1953), Female

Classification details	Referral details
Care type: Residential Permanent	Referral channel: Provider Initiated
	Request type: Reconsideration

VIEW RESIDENTIAL CARE AND CLIENT RECORD **RECALL RECONSIDERATION REQUEST**

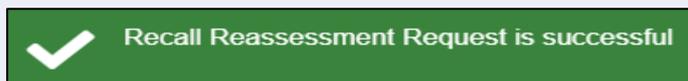
! Selecting reason **Client Unavailable** will allow you to notify the Department when the client becomes available for assessment which can automatically request another reassessment for you.

Selecting **Client Deceased** will mark the client as deceased in Department records, please ensure you have confirmed before submitting. The reassessment request will be closed. Selecting **Other** will require you to enter a reason. The reassessment request will be closed.



4. Select the recall reason from the drop down and select **RECALL REASSESSMENT REQUEST** or **RECALL RECONSIDERATION REQUEST** button.

5. The reassessment or reconsideration request will now be recalled when the below green banner appears.

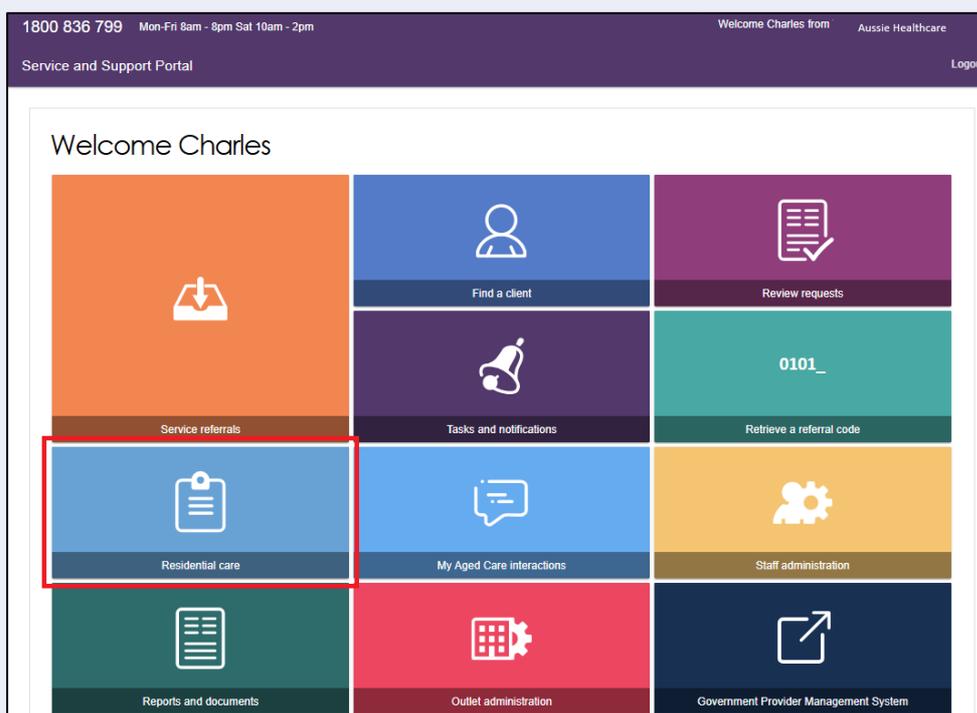


8.6 Notify Client is Available for Assessment

Team Leaders will be able to notify the department that a client is available for assessment once the client has returned to your residential facility.

The **Notify client is now available for assessment** option is available to Team Leads if the client's previous residential funding assessment referral was rejected or recalled with the reason **Client Unavailable**.

1. On the **Home** screen, select the **Residential Care** tile.



- On the **Care Recipients** screen, select the client you wish to notify is available for assessment.

Last Name	First Name	Aged Care User ID	Care Type	Classification	Effective Date	Status	Request type	Service
AGARWAL	Kajal	AC15902554	Residential Permanent	Class 99	22 June 2022	Active Classification		Horton House and Warrington Lodge
BIRD	Big	AC56370232	Residential Permanent	Class 99	14 June 2022	Active Classification		Horton House and Warrington Lodge
BOISCLAIR	Warren	AC73708951	Residential Permanent	Class 2	17 June 2021	Active Classification		Horton House and Warrington Lodge
BOISCLAIR	Carl	AC80478639	Residential Permanent	Class 99	3 July 2015	Active Classification		Horton House and Warrington Lodge
BOISCLAIR	Paul	AC66539842	Residential Permanent	Class 9	24 May 2021	Active Classification		Horton House and Warrington Lodge
BOUY	Will	AC99276933	Residential Permanent	Class 9	4 June 2021	Active Classification		Horton House and Warrington Lodge
BOUY	Will	AC99276933	Residential Permanent	Class 9	4 June 2021	Active Classification		Horton House and Warrington Lodge

- On the **Client Record – Residential Care** tab, select the **NOTIFY CLIENT IS NOW AVAILABLE FOR ASSESSMENT** button.

- A pop-up will appear to confirm the client is now available for assessment. If you would like a reassessment request to be automatically triggered select **REQUEST REASSESSMENT AND CONFIRM CLIENT IS AVAILABLE**.

Optionally, select **CONFIRM CLIENT IS NOW AVAILABLE FOR ASSESSMENT** allows you to manually request a reassessment later as needed.

- The client will now be available for assessment and a request is automatically triggered, when the following green banner appears.



8.7 Request Tab and Request Status Definitions

The **Requests** tab within the Residential Care tile lists all residential funding assessment requests including initial assessments, reassessments and reconsiderations. The Request status indicates the progress of the assessment referral. The table below lists the statuses in order of progress along with a description of the status.

! Reference to the term **Assessment** includes initial assessments, reassessments and reconsiderations.

REQUEST STATUS DEFINITIONS

Status	Description
Pending Allocation	A referral for a residential funding assessment has been created and is yet to be issued to a residential funding assessment organisation.
Pending Assessment	A referral for a residential funding assessment has been issued to a residential funding assessment organisation and the assessment is yet to be completed.
Finalised	The assessment has been completed and uploaded by the assessor.
Rejected	The request for assessment has been rejected for reasons the client is unavailable for assessment i.e., in hospital or on leave
Recalled	The request for assessment has been recalled for reasons the client is unavailable for assessment i.e., the client is deceased

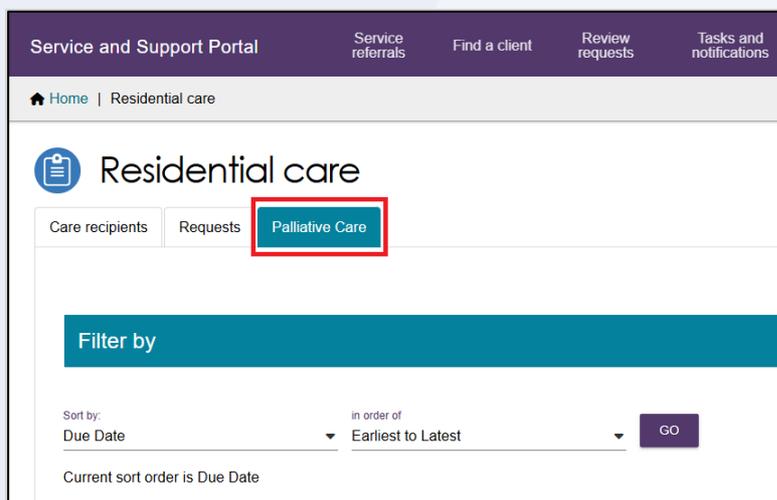
8.8 Palliative Care

8.8.1 View Clients Marked Palliative on Entry

For clients who entered into a residential facility for permanent palliative care, the **Palliative Care** tab will display the list of clients and any actions to be completed to validate their palliative status. Forms submitted will be reviewed by the Department and actioned based on the result.

Once validation is completed, the client record will still be available in this tab.

Select the **Palliative Care** tab to view all clients that were marked Palliative on Entry.



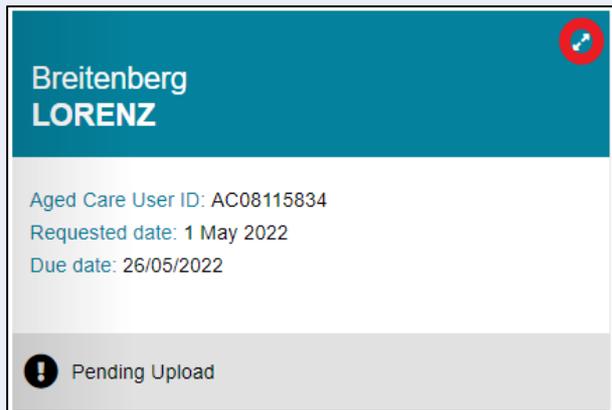
The screenshot shows the 'Service and Support Portal' interface. At the top, there are navigation links: 'Service referrals', 'Find a client', 'Review requests', and 'Tasks and notifications'. Below this is a breadcrumb trail: 'Home | Residential care'. The main content area is titled 'Residential care' and contains three tabs: 'Care recipients', 'Requests', and 'Palliative Care'. The 'Palliative Care' tab is highlighted with a red box. Below the tabs is a 'Filter by' section with a dropdown menu for 'Sort by' set to 'Due Date' and a secondary dropdown for 'in order of' set to 'Earliest to Latest'. A 'GO' button is located to the right of these dropdowns. At the bottom of the filter section, it states 'Current sort order is Due Date'.

8.8.2 Upload Palliative Care Documents

For a client who was marked as palliative on entry, their status will be set to **Pending Upload**.

1. Expand the client and select **Upload Palliative Documents**.

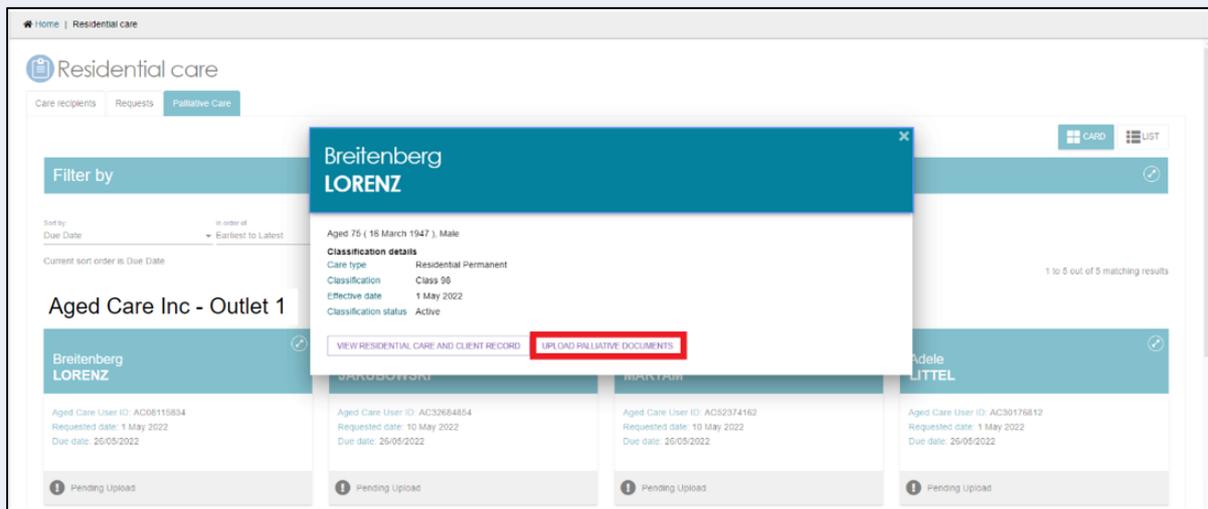
! The Palliative Care Status Form must be submitted within 14 days of notification of entry to the Department via the My Aged Care Service and Support Portal. Once the entry is processed, a notification will be generated, please refer to [Viewing tasks and notifications](#) for more information.



Breitenberg LORENZ

Aged Care User ID: AC08115834
Requested date: 1 May 2022
Due date: 26/05/2022

Pending Upload



Home | Residential care

Residential care

Care recipients | Requests | Palliative Care

Filter by

Sort by: Due Date | in order of: Earliest to Latest

Current sort order is Due Date

Aged Care Inc - Outlet 1

Breitenberg LORENZ

Aged Care User ID: AC08115834
Requested date: 1 May 2022
Due date: 26/05/2022

Breitenberg LORENZ

Aged 75 (18 March 1947), Male

Classification details

Case type: Residential Permanent
Classification: Class 98
Effective date: 1 May 2022
Classification status: Active

VIEW RESIDENTIAL CARE AND CLIENT RECORD | **UPLOAD PALLIATIVE DOCUMENTS**

1 to 5 out of 5 matching results

Breitenberg LORENZ

Aged Care User ID: AC08115834
Requested date: 1 May 2022
Due date: 26/05/2022

Breitenberg LORENZ

Aged Care User ID: AC32684854
Requested date: 10 May 2022
Due date: 26/05/2022

Breitenberg LORENZ

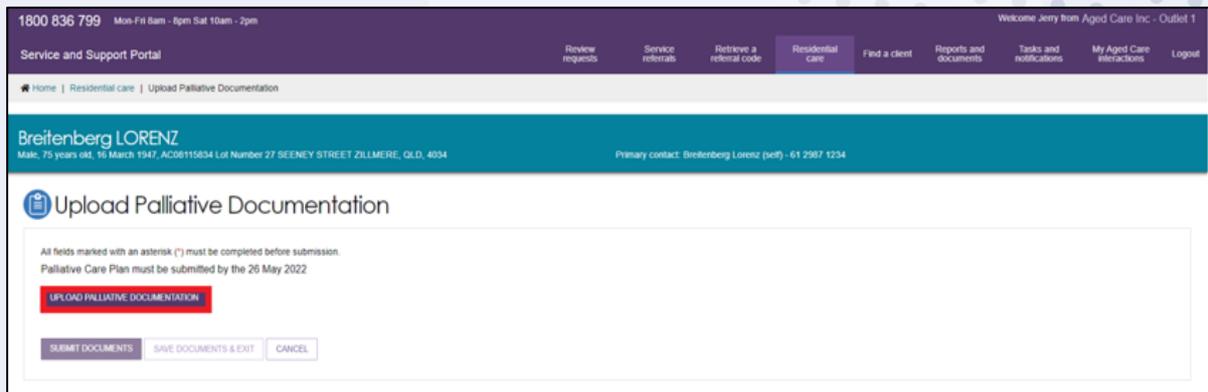
Aged Care User ID: AC52374162
Requested date: 10 May 2022
Due date: 26/05/2022

Breitenberg LORENZ

Aged Care User ID: AC30176812
Requested date: 1 May 2022
Due date: 26/05/2022

Pending Upload

2. Upload completed Status Form to the portal and submit within the due date.



1800 836 799 | Mon-Fri 8am - 6pm Sat 10am - 2pm | Welcome Jerry from Aged Care Inc - Outlet 1

Service and Support Portal

Review requests | Service referrals | Retrieve a referral code | Residential care | Find a client | Reports and documents | Tasks and notifications | My Aged Care Interactions | Logout

Home | Residential care | Upload Palliative Documentation

Breitenberg LORENZ

Male, 75 years old, 18 March 1947, AC08115834 Lot Number 27 SEENEY STREET ZILLMERE, QLD, 4034 | Primary contact: Breitenberg Lorenz (self) - 61 2987 1234

Upload Palliative Documentation

All fields marked with an asterisk (*) must be completed before submission.
Palliative Care Plan must be submitted by the 26 May 2022

UPLOAD PALLIATIVE DOCUMENTATION

SUBMIT DOCUMENTS | SAVE DOCUMENTS & EXIT | CANCEL

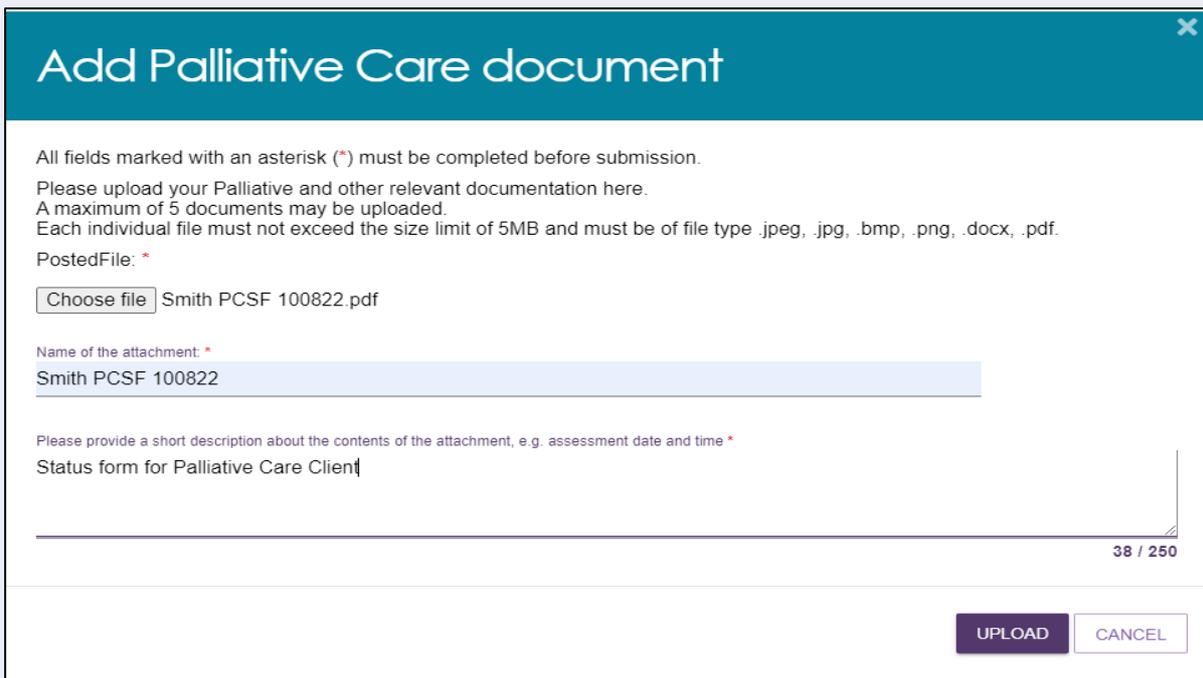


Select **UPLOAD PALLIATIVE DOCUMENTATION**, this will provide a pop up to allow the upload of the form saved on your laptop/computer.



! Only one file may be uploaded each time, as each file requires an individual name and description.

3. Fill out the file name and provide a short description. For the File Name as well as the name of the file uploaded in the system, please follow the naming convention: **[Client Last Name] PCSF [Date Uploaded – DDMMYY]**.



Optionally, you may upload additional information (if previously discussed with the Department) as necessary by selecting **UPLOAD PALLIATIVE DOCUMENTATION** and repeating the steps above.

4. If you wish to come back and upload at a later time, select **SAVE DOCUMENTS & EXIT**. Documents will not be reviewed by the department, until submitted.

If you have reviewed documents and are ready to submit to the department, select **SUBMIT DOCUMENTS**.



1800 836 799 Mon-Fri 8am - 8pm Sat 10am - 2pm Welcome Jerry from Aged Care Inc - Outlet 1

Service and Support Portal Review requests Service referrals Refine a referral code Residential care Find a client Reports and documents Tasks and notifications My Aged Care interactions Logout

Home | Residential care | Upload Palliative Documentation

Mr Breitenberg N LORENZ (Moses)
 Male, 75 years old, 15 March 1947, AC08115834
 Lot Number 27 SEENEY STREET ZILLMERE, QLD, 4034 Primary contact: Breitenberg Lorenz (self) - 61 2987 1234
No support relationships recorded

Upload Palliative Documentation

All fields marked with an asterisk (*) must be completed before submission.
 Palliative Care Plan must be submitted by the 24 August 2022

UPLOAD PALLIATIVE DOCUMENTATION

Smith PCSF 100822 [pdf 36.14KB] 10 Aug 2022

Status form for Palliative Client
 Uploaded by BL_OB061538

SUBMIT DOCUMENTS **SAVE DOCUMENTS & EXIT** CANCEL

Home | Residential care | Upload Palliative Documentation

Breitenberg LORENZ
 Male, 75 years old, 15 March 1947, AC08115834 Lot Number 27 SEENEY STREET ZILLMERE, QLD, 4034 Primary contact: Breitenberg Lorenz (self) - 61 2987 1234

Upload Palliative Documentation

All fields marked with an asterisk (*) must be completed before submission.
 Palliative Care Plan must be submitted by the 26 May 2022

UPLOAD PALLIATIVE DOCUMENTATION

Status Form [pdf 36.14KB] 13 May 2022

Status form that indicates client requires Palliative Care.
 Uploaded by BL_OB061538

Care Plan Summary [pdf 36.14KB] 13 May 2022

Care Plan Summary form that indicates how the client will receive Palliative Care.
 Uploaded by BL_OB061538

SUBMIT DOCUMENTS **SAVE DOCUMENTS & EXIT** CANCEL

The status of this client will now change to Pending Approval, and a Palliative Review Officer from the Department will review the documents.

Breitenberg LORENZ

Aged Care User ID: AC08115834
 Requested date: 1 May 2022

Pending Approval

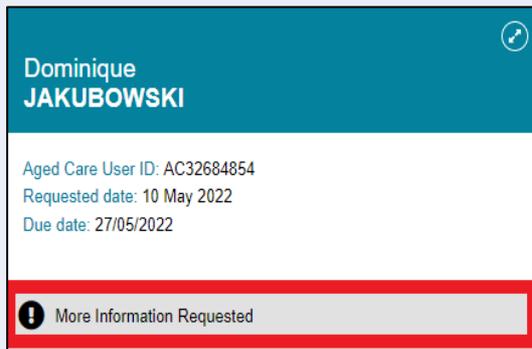


8.8.3 Palliative Care Status Form Outcomes

There are three possible outcomes of a submitted Palliative Status Form: More Information Requested, Approved, or Rejected.

8.8.3.1 More Information Requested

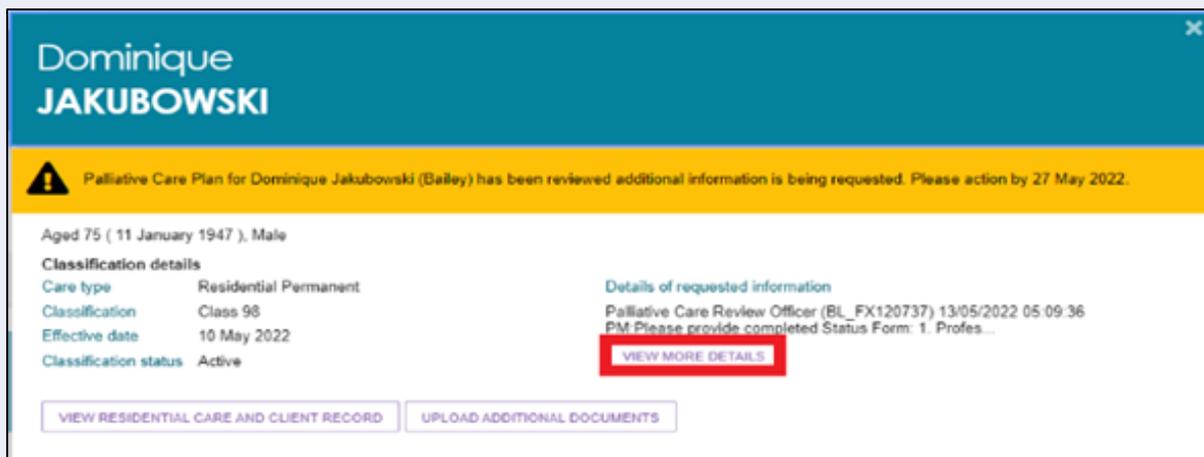
If the palliative review officer finds that there is insufficient information for them to action the Palliative Care Form, they will request more information with a description on what is required.



- ! You will receive 14 additional days from the date the Palliative Review Officer requested more information to upload additional documents. This extension will only occur once per resident, so please include all information required to validate the resident's palliative care status.

When more information is requested, a notification will be generated, please refer to [Viewing tasks and notifications](#) for more information.

1. Expand the client tile and select **VIEW MORE DETAILS** to read guidance text from the palliative review officer.



- ! The existing document will no longer be viewable or editable and a new version of the document will need to be uploaded.

The latest date should be included in the name of the file to align with the naming convention: **[Client Last Name] PCSF [Date Uploaded – DDMMYY]**



If necessary, provide a response by selecting **ADD RESPONSE**, update new documents and resubmit.

8.8.3.2 Approved and Rejected Palliative Care Status Forms

Once a Palliative Care Status Form is approved, you will receive a notification, and the status of the client will change to **Approved**. The client/resident will be assigned AN-ACC class 1 and will be eligible for subsidy at that rate.

If, after requesting additional information, the Palliative Review Officer finds that the documents uploaded do not provide sufficient evidence for a client to be deemed palliative, they will reject the request for palliative status.

You will receive a notification, the status on the palliative care tile for the client will change to **Rejected**, and a referral generated for an AN-ACC assessment to determine the client/resident's AN-ACC Classification.

<p>Breitenberg LORENZ</p> <p>Aged Care User ID: AC08115834 Requested date: 1 May 2022</p> <p>Rejected</p>	<p>Ermitt MARYAM</p> <p>Aged Care User ID: AC52374162 Requested date: 10 May 2022</p> <p>Approved</p>
---	---

If you wish to appeal the decision, please contact My Aged Care at myagedcare@health.gov.au with evidence regarding the reasons for your appeal.

