



Aged Care Assessor App User Guide

This Aged Care Assessor App (the App) user guide outlines essential information for both aged care needs assessors (needs assessors) who use the Integrated Assessment Tool (IAT) and/or residential aged care funding assessors (RAC funding assessors) who use the Australian National Aged Care Classification (AN-ACC) assessment tool.

The user guide will walk users through how the App can be utilised both online and offline, allowing for users to use the App in different situations.

This user guide has been split into the following sections:

- Part A is for needs assessors and/or RAC funding assessors who complete assessments using either AN-ACC or IAT.
- Part B is for needs assessors who complete assessments using the IAT.
- Part C is for RAC funding assessors who complete assessments using the AN-ACC assessment tool.

! On 1 November 2025, the *Aged Care Act 2024* and the Support at Home program come into effect with significant change to support plans in the IAT.

To ensure the right IAT is used, and triage can continue for priority referrals, any assessments in the following statuses already started prior to 1 November 2025 and in progress on 1 November 2025 must be restarted:

- Triage complete, main assessment not started
- Triage complete, main assessment in progress (includes incomplete support plan)
- Main assessment completed, awaiting delegate decision (comprehensive assessments).

For information on the **Restart Assessment Process**, please refer to *Management of active assessments for 1 November 2025 transition – Standard Operating Procedure and Restarting In Progress Assessments for Support at Home* (instructional video).

! From 1 November 2025, there are changes to assessment delegations under the *Aged Care Act 2024*, for both Clinical and Non-clinical Assessment Delegates.

To understand **Assessment Delegate changes**, refer to 'Chapter 7: Delegations and Approvals under the Act' of [My Aged Care Assessment Manual](#).

For CHSP only: For guidance on the interim process explaining Manual Delegate

Approval for CHSP only for comprehensive and home support assessments, and how it impacts assessors during support plan completion and finalisation (including issuing referral code(s) from 1 November 2025, refer to *Manual Delegate Approval for CHSP – Standard Operating Procedure* and instructional videos for comprehensive and home support assessments.

Version 5.1 – February 2026

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Part A - Needs assessors and RAC funding assessors

1. Introduction

The Aged Care Assessor App (the App) enables both needs assessors and Residential Aged Care (RAC) funding assessors to assess an older Australians' aged care needs while offline. The App allows users to perform a subset of the functions available in the assessor portal, including the ability to conduct an assessment using the Integrated Assessment Tool (IAT) or Australian National Aged Care Classification (AN-ACC) assessment tool, under the *Aged Care Act (2024)*.

Needs assessors and RAC funding assessors can undertake these processes using the App:

- search for existing and register new clients
- create offline clients
- self-refer for assessment
- view and search assigned referrals
- download a client's referral for assessment
- download a client's support plan review (needs assessors only)
- view and add information about a client
- complete identity verification (wallet check)
- undertake assessments using IAT (needs assessors only)
- undertake assessments using AN-ACC (RAC funding assessors only)
- undertake support plan reviews (needs assessors only)
- commence development and update a client's support plan
- upload assessment and review information to the My Aged Care assessor portal
- view and upload client attachments
- manually remove or cancel assessments from the App
- view and set up supporter relationships
- complete Residential Respite Classification Assessments (clinical needs assessors only).

2. Minimum requirements for devices to run the App

The App is supported on the following operating systems:

Operating System	Minimum	Recommended
Android	V14, 6GB RAM	V16 and up, 8GB RAM
Apple iOS	V18, 6GB RAM	V18, 8GB RAM
Windows	10, 8GB RAM	11, 16 GB RAM

Please note the screenshots in this guide feature the app version 34 on iPadOS 18.7.



If you are using another device, the App will appear slightly differently.

! The App will time out if inactive for 15 minutes and you will need to log in again.

If you do not use the App for 14 days, you will be locked out of the app. You will require an unlock code, which can be generated from the app section in the My Aged Care Assessor Portal.

3. Setting Up the App

! Prior to using the App, you will need to:

- [Download the App](#) from your device's application store.
- Have an active role in the assessor portal (you must ensure your registered email address is current and up to date).
- Have an activation code, that can be obtained either via the App section of the assessor portal or by calling the My Aged Care service provider and assessor helpline (1800 836 799). The activation code will be active for 24 hours from the time it is issued. If your code expires, select **Get Activation Code** in the App section of the assessor portal or call 1800 836 799 to have another code issued. For RAC funding assessors, they can call the AN-ACC Operational Support Line on 02 6289 7190 between 8am - 6pm AEST Monday to Friday to request an activation code.

3.1 Downloading and Installing the App

Before [downloading the App](#), depending on the device you are using, you will need to have an active:

- Microsoft account (for Windows device)
- Apple account (previously known as Apple ID) (for Apple iPad), or
- Google account (for Samsung or Android).

! A sideloaded version of the Windows App is available to assessment organisations that have a restricted IT environment.

For instructions on how to download the sideloaded version of the App, please refer to the section [Sideloaded App for Organisations](#).

1. Once you have an active account, navigate to your device's application store (Microsoft store, Apple App Store or Google Play Store).



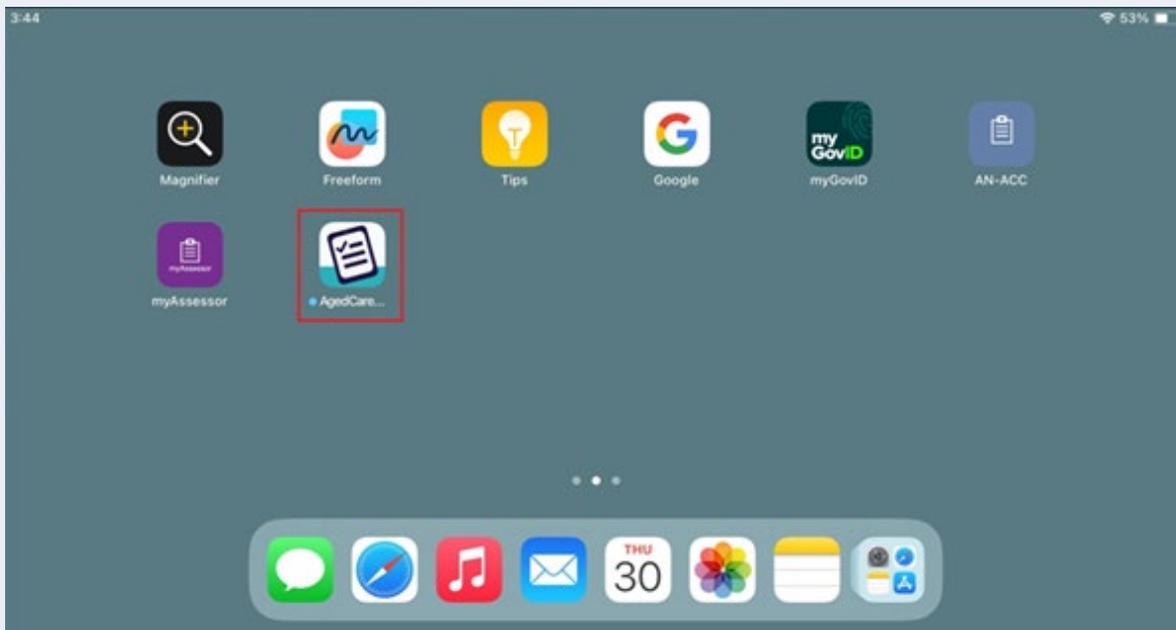
2. Search for the App by entering 'Aged Care Assessor App' in the search box and select the App icon to open the App details.



3. Select **Install** to download the App to your device. Once successfully downloaded, it will display on your device.

! The App will be located where your device stores its applications. This will differ between the supported devices.

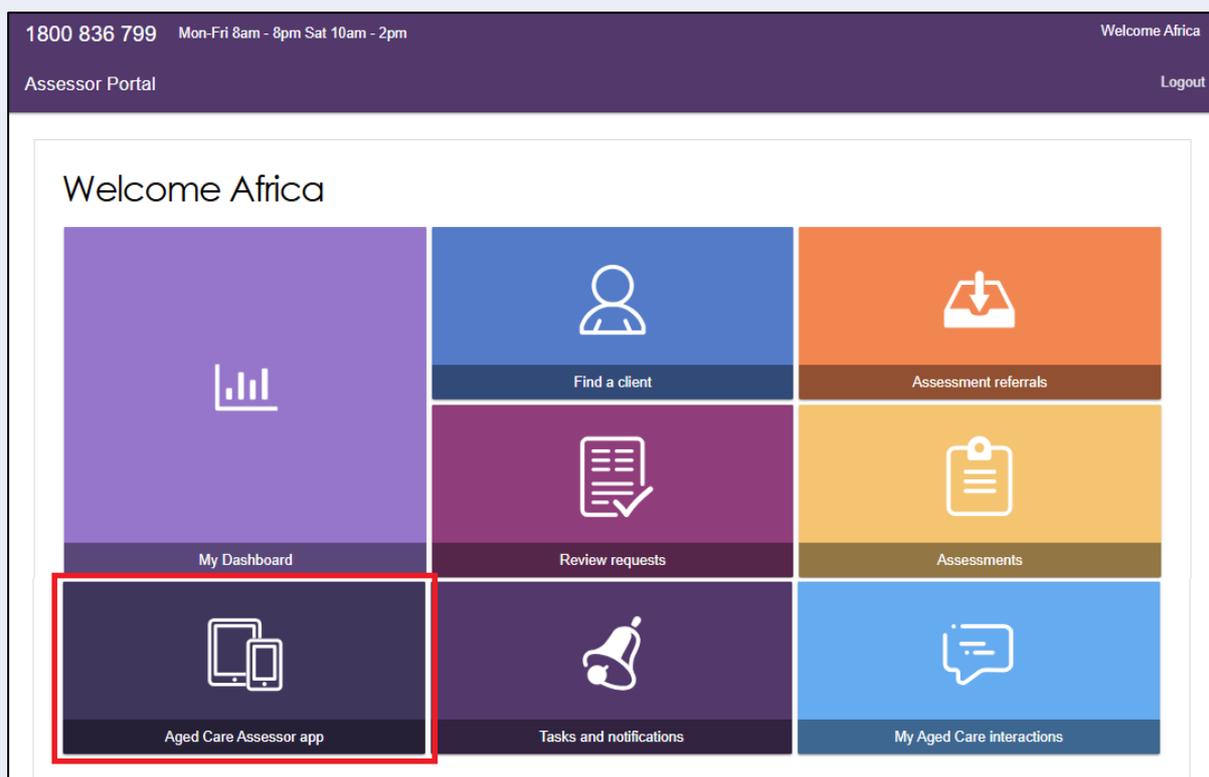
If you have difficulties downloading the App onto your device, contact your organisation administrator or relevant IT area.



3.2 Activating the App

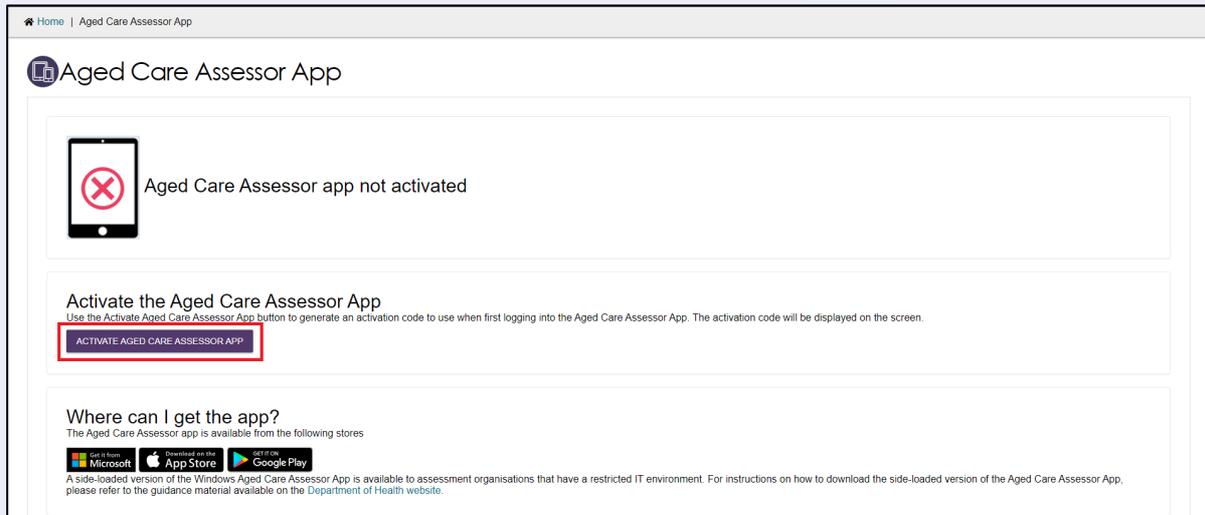
Once the App has been downloaded to your device, follow the steps below to activate the App.

1. Log onto the Assessor Portal, then navigate to the **Aged Care Assessor app** tile.

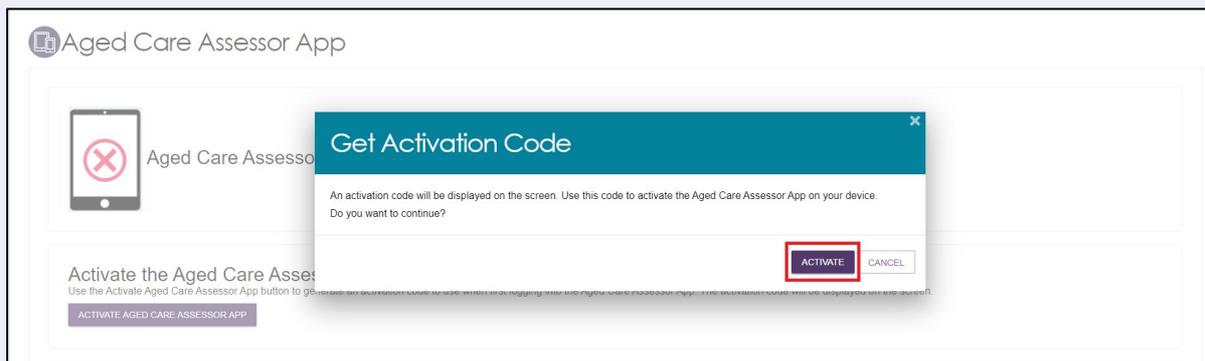


In this section, you will be able to view your App activation status, any referrals downloaded to your device, and generate a code to unlock, activate or reactivate your device.

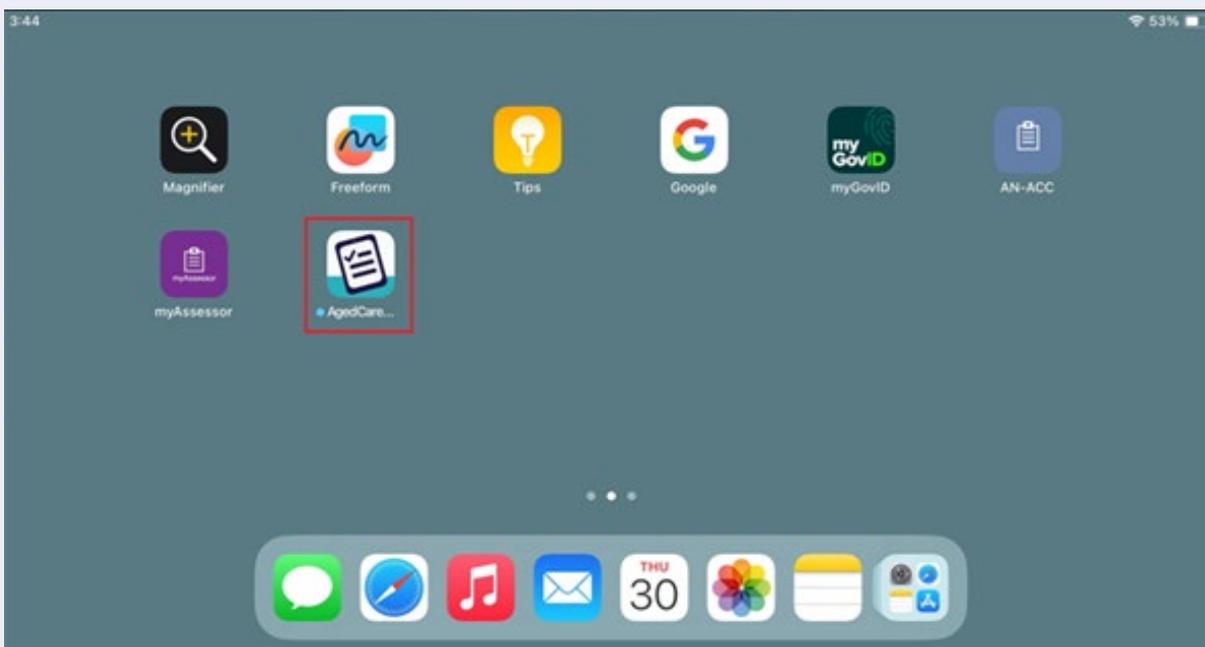
Select **Get Activation Code** to send an activation code to your registered email address.



2. Select **Activate** to generate the code.



3. Open the App from your device.



4. Enter the email address associated with your staff account in the Assessor Portal and your activation code, and then select **Activate Application**.

Verification and activating your application

Please enter your registered assessor email address, and the 16 digit activation code.
Fields marked with an * are mandatory.

Email address *
Enter your email address

Activation code *
Find your activation code in the Assessor Portal

Activate application

Alternatively, scan QR code to verify

Or you can select **Alternatively, scan QR code to verify** and scan the QR code shown on the Assessor Portal.

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

Assessor Portal My Dashboard Residential Funding Renewals Find a service provider Reports and documents Aged Care Assessor app Tasks and notifications My Aged Care interactions Logout

Home | Aged Care Assessor App

Get Activation Code

Your Aged Care Assessor app activation code is:
7BDF-5076-891F

Alternatively, select the 'Scan QR Code' button in your Aged Care Assessor app to scan the QR code below to activate access.

CLOSE

Activate the Aged Care Assessor App
Use the Activate Aged Care Assessor App button to get started.

ACTIVATE AGED CARE ASSESSOR APP

! The email entered will be verified against the information held in My Aged Care.
If the information is incorrect, an error message will be displayed.

5. The **Terms of Use** will be displayed.

Read the Terms and Conditions and if you agree, select the **Accept terms and continue** button, to proceed.

If you do not accept, you will not be able to use the App.



AGED CARE ASSESSOR APP TERMS OF USE

This license is for the use of the "Aged Care Assessor" mobile app (**App**) and is between the person who downloads the App (**You**) and the Commonwealth of Australia acting through the Department of Health and Aged Care ABN 83 605 426 759 (**Department**). Your use of the App is subject to Your agreement to these terms.

- 1. License terms :** The App is licensed by the Department to You in accordance with these terms, and all notices and other instructions provided by us from time to time. If You are entering into these terms as an employee of an organisation, You warrant and agree that You are authorised by Your employer to agree to these terms and bind Your employer.
- 2. License parties :** This license is between the Department and You only, and not with any other person or the App publisher (Apple, Google or Microsoft as the case may be). Subject to the terms of this license, and excluding the data inputted by You into the App, the Department is solely responsible for the App and its content. The Department reserves all rights not expressly granted to You.
- 3. Description of App:** The service provided by the App allows You to: (i) collect for the Department certain assessment information from aged care residents, care providers, and residents' families and friends for aged care needs and funding assessment purposes as authorised by Your role and input the responses into an assessment tool within the App; and (ii) upload completed assessments via the App to the Department's secure IT systems. You acknowledge that: (iii) the App may not be compatible with certain devices and operating systems; and (iv) while the Department endeavours to ensure that the App is free from viruses and other harmful code, this cannot be guaranteed.
- 4. Scope of license :** The license granted to You by the Department is limited to a non-exclusive, non-transferable license to use the App on the device that You download it to.
- 5. License restrictions:** This license does not allow You to: (i) use the App on any device that You do not own or control; (ii) distribute or make the App available over a network where it could be used by multiple devices at the same time; (iii) rent, lease, sell or sublicense the App or any information contained within the App; (iv) copy (except as expressly permitted by this license and any App publisher terms), decompile, reverse engineer or modify the App (except to the extent permitted by law); (v) access or use the App in breach of any laws or for any unlawful purpose; (vi) distribute viruses, spyware or any other similar software that may damage the operation of any hardware or software; (vii) collect or store personal data about other users of the App; (viii) submit any documentation or information which is irrelevant or in excess of the requests for information contained within the App; or (ix) upload any harmful code (including any viruses, worms or Trojan horses) or otherwise disrupt or

Cancel

Accept terms and continue

6. Once you have accepted the terms, the Privacy notice for the App will appear. Read the notice and then select the **Continue** button, to proceed.

PRIVACY NOTICE FOR AGED CARE ASSESSOR APP

When this privacy notice applies

This privacy notice applies to your use of the Aged Care Assessor App.

This privacy notice explains how we (the **Australian Government Department of Health and Aged Care**) manage personal information to meet our obligations under the *Privacy Act 1988* (Cth) and the Australian Privacy Principles.

Information we collect

We collect the following personal information about you:

- your name
- your email address
- your activation code (obtained through the Assessor Portal)
- your Assessor ID
- your organisation and role details
- your device details (make, model, operating system, App Store used for download)
- system logs when you use the App.

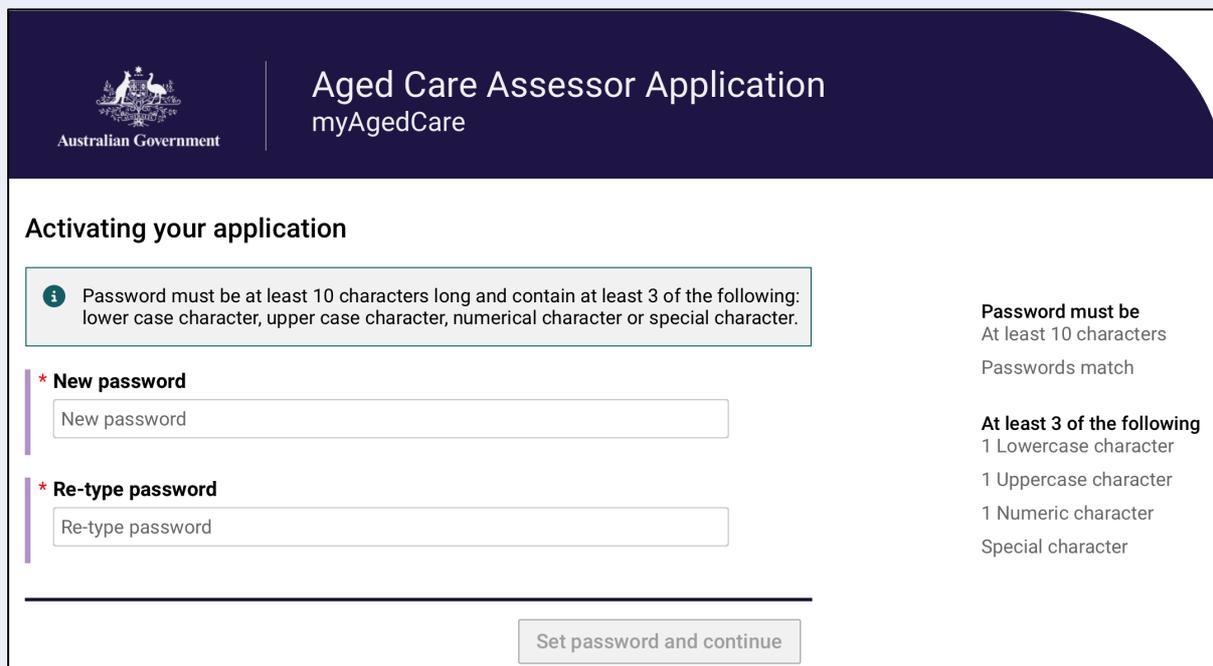
Why we collect this information

Cancel

Continue

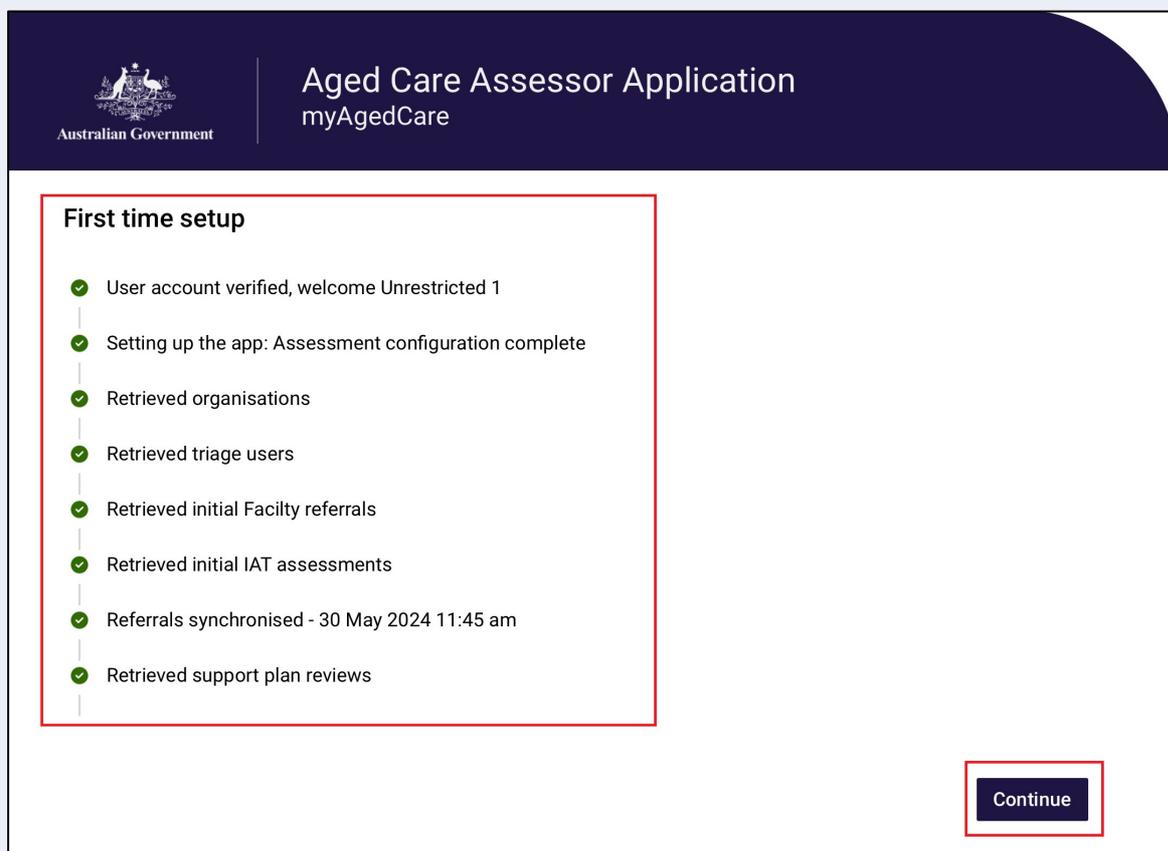
7. Once the App's Terms of Use has been accepted, you will be presented with the password screen. Create a password according to the rules displayed. You will be asked to enter the password a second time to ensure it is correct.

Use this password to unlock the App each time it is opened.



The screenshot shows the 'Activating your application' screen. At the top left is the Australian Government logo. The title is 'Aged Care Assessor Application myAgedCare'. The main heading is 'Activating your application'. An information icon (i) is followed by the text: 'Password must be at least 10 characters long and contain at least 3 of the following: lower case character, upper case character, numerical character or special character.' Below this are two input fields: '* New password' and '* Re-type password'. To the right, the password requirements are listed: 'Password must be At least 10 characters Passwords match At least 3 of the following 1 Lowercase character 1 Uppercase character 1 Numeric character Special character'. At the bottom center is a button labeled 'Set password and continue'.

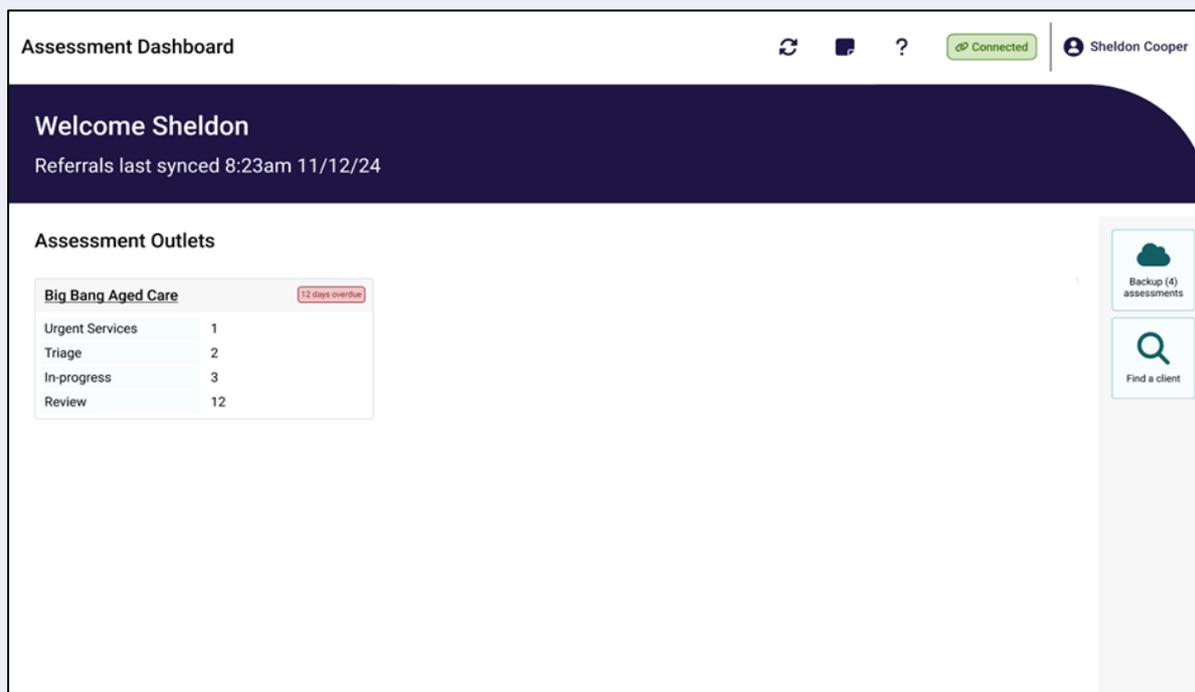
8. After setting your new password, the App will complete a first time setup such as your profile and your assessment organisations information. Once the setup is complete, select the **Continue** button.



The screenshot shows the 'First time setup' screen. At the top left is the Australian Government logo. The title is 'Aged Care Assessor Application myAgedCare'. The main heading is 'First time setup'. A list of setup steps is shown, each with a green checkmark: 'User account verified, welcome Unrestricted 1', 'Setting up the app: Assessment configuration complete', 'Retrieved organisations', 'Retrieved triage users', 'Retrieved initial Facility referrals', 'Retrieved initial IAT assessments', 'Referrals synchronised - 30 May 2024 11:45 am', and 'Retrieved support plan reviews'. At the bottom right is a button labeled 'Continue'.



9. You have now successfully completed the activation process. The next time you sign in to the App, follow the steps outlined below in the [Login to the App](#) section.
10. After successfully logging in, the home page (dashboard) will display.



! The first time you log in to the App you may not see any referrals.

Select **Refresh referrals** to load assessment referrals assigned to you.

If you experience issues with refreshing referrals, follow the steps in [Troubleshooting and Diagnostics](#) to diagnose issues experienced with the App.

3.3 Uninstalling the App

If you experience any issues with the App, you may be instructed to uninstall and then reinstall the App. Follow the steps to uninstall the app depending on the operating system you use.

Android

1. Touch and hold the App icon.
2. Tap **App Info**.
3. Tap **Uninstall** and confirm the prompt.

iOS

1. Touch and hold the App.
2. Tap **Remove App**.
3. Tap **Delete App**, then tap **Delete** to confirm.

Windows 10+

1. Select Start and look for the app or program in the list shown.
2. Press and hold (or right-click) on the App, then select **Uninstall**.



3.4 First time access following a reinstall of the App

If you wish to reinstall the App after uninstalling, you will need to activate your App status again. To do this please refer to [Activating the App](#).

3.5 Reactivating the App

The App can only be used on one device by one user at any one point in time, and access cannot be shared. If the device needs to be assigned to another user, select the **Logout** button from the sign in screen in the app.

Alternatively, the user that now has the device can reactivate the app:

1. Log onto the Assessor Portal and go to the **Aged Care Assessor app** tile.
2. Select **RE-ACTIVATE AGED CARE ASSESSOR APP**. This will deactivate the App and send a new activation code to the user's registered email address. Please note that this will remove all client and user data from the device.

Re-activating the Aged Care Assessor App

1. In order to re-activate the Aged Care Assessor app, select 'Reactivate Aged Care Assessor app' below.
2. Possible reasons for re-activation are
 - o I uninstalled the app and am installing it again
 - o I lost my device and need to activate a new device
 - o I am swapping to a different device
3. This will deactivate your current Aged Care Assessor app. The new activation code will be displayed on the screen.

RE-ACTIVATE AGED CARE ASSESSOR APP

3. Select **Re-activate Aged Care Assessor App** at the pop up.

Get Activation Code

Your device will be deactivated and a new activation code will be displayed on the screen. Use this code to re-activate the Aged Care Assessor App.

Do you want to continue?

RE-ACTIVATE AGED CARE ASSESSOR APP CANCEL

4. The Get Activation Code pop up appears. Follow the rest of the steps in the section [Activating the App](#).

The new user can also get the Activation code by calling the My Aged Care service provider and assessor helpline (1800 836 799).

4. Launching and closing the App

4.1 Login to the App

To launch the App after the first-time activation process you should:

1. Open the App from your device. The password page will display, and you will be prompted to enter your password and then select **Login**.



Aged Care Assessor Application
myAgedCare

Login

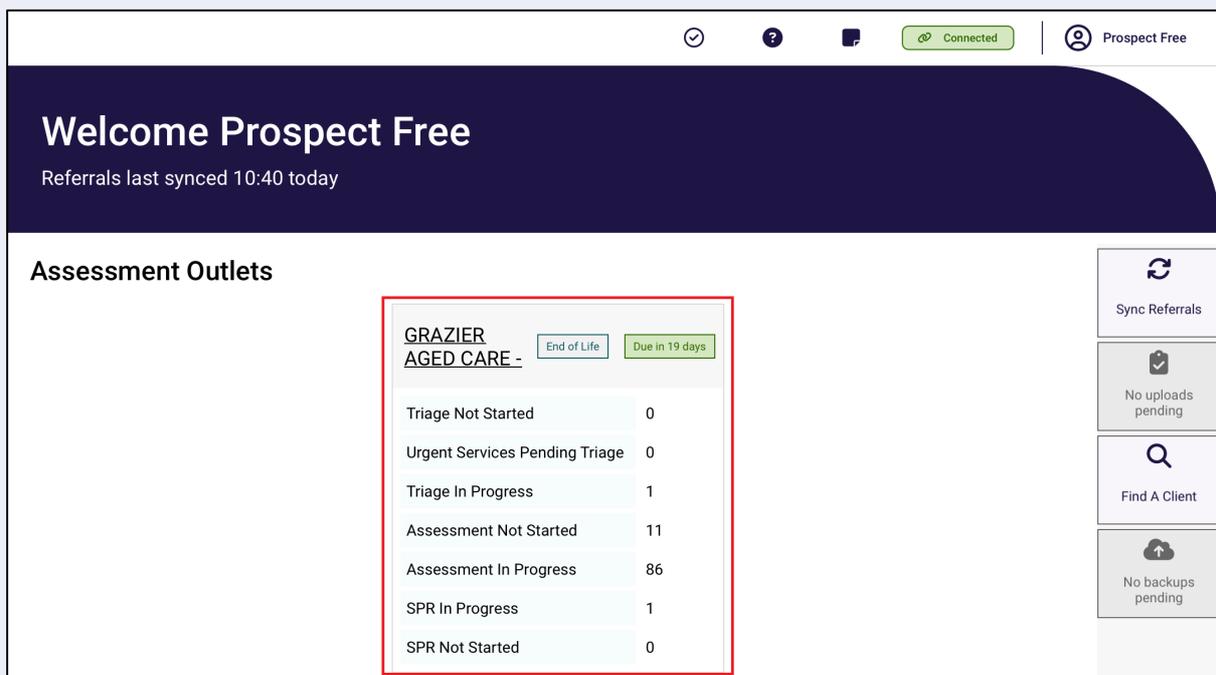
Username
cleo.compton@testuat.au

Password
Enter your password

Forgot your password? **Login** →

Logout

2. The Dashboard displays, and you can view the list of outlets or facilities that you have been assigned to assess. If you have any assessments assigned to you then you will also see these under the related outlet or facility.



Connected | Prospect Free

Welcome Prospect Free

Referrals last synced 10:40 today

Assessment Outlets

GRAZIER AGED CARE -	
Triage Not Started	0
Urgent Services Pending Triage	0
Triage In Progress	1
Assessment Not Started	11
Assessment In Progress	86
SPR In Progress	1
SPR Not Started	0

End of Life | Due in 19 days

Sync Referrals

No uploads pending

Find A Client

No backups pending



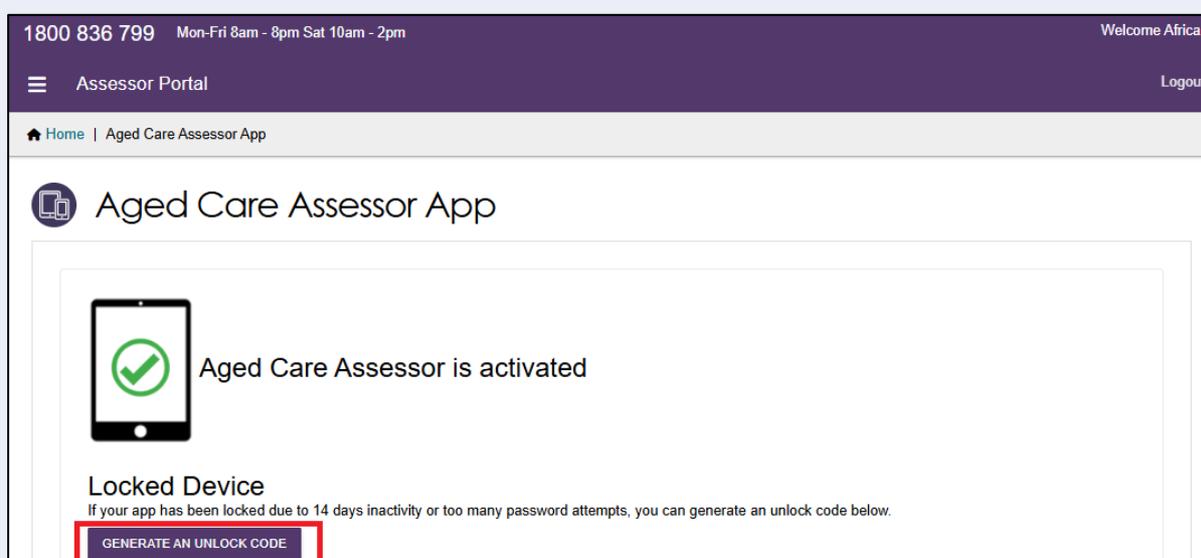
4.2 Inactivity time-out

The App will timeout if there is no activity for 5 minutes and you will be required to login to the app again. Provided you have been working in an online mode, all data you have been working on will be auto-saved every 15 minutes. If you are working in offline mode and are logged out of the app due to inactivity, data you have entered will not be backed up to My Aged Care but will be available on the device still.

4.3 Generating an Unlock Code

You will be locked out of the App if you forget your password, enter your password incorrectly five times, or do not use the App for 14 days.

You can regain access in the App section of the assessor portal. To do so, select **Generate an Unlock Code**. Enter this code into your device and you will then be able to reset your password and log in.



If the portal is unavailable, you can also call the My Aged Care service provider and assessor helpline on 1800 836 799 to generate an unlock code.

4.4 Closing the App

To close the App, you can either navigate to the top right of the screen and close the App window (Windows), or swipe up from the bottom of your screen (most iOS and Android versions).

4.5 Logging out of the App

This will remove your current activation and will require a new code to be entered.

1. Select your profile button from the dashboard menu screen.

Welcome Sammy Stark
Referrals last synced 13:15 today

Assessment Outlets

UAT SAS ACAT RAS Outlet 3 days overdue	
Triage Not Started	1
Urgent Services Pending Triage	0
Triage In Progress	1
Assessment Not Started	0
Assessment In Progress	1
SPR In Progress	0
SPR Not Started	0

Sync Referrals
No uploads pending
Find A Client
Backup 4 Assessments

2. Select the **Logout** button.

Dashboard Connected

Profile and settings

Assessor profile

Name Sammy Stark
ID BL_SS737371
Discipline Not set
Email sam.stark@uat.com
Roles
ACG AO Comprehensive Assessor - Outlets
ACG AO Delegate Support - Outlets
ACG AO Home Support Assessor - Outlets
ACG AO Team Lead - Outlets
ACG AO Triage Delegate - Outlets

Settings

Use biometric login
Use advanced logging
Check connectivity
Change password
Submit feedback
Test helper enabled

Device information

App version 31.0.0 (12)
Operating System (OS) iOS - 17.5 (iOS - 17.5)

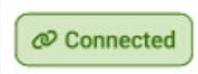
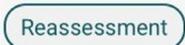
3. Confirm that you wish to logout.

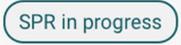
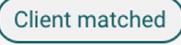
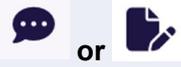
Logout

⚠ If you logout, the general and tool specific notes (if any) that you have recorded will be lost and unable to be recovered.



5. App symbols

Symbol	Definition
	Sync - Starts a sync to gather user profile data and assigned referrals. Use this if after a few minutes on first log in you still do not see any referrals.
	No uploads pending – means that there are no assessments that are pending to be uploaded via the internet. Click this to upload referrals when they are in Completed status.
	Find a Client – Opens the Find a Client page to start a search.
	Backup Assessment – click this button to backup all assessments.
	Quick Notes – Opens the Quick Notes page to quickly access a free text field for general purpose comments. This is a feature which allows notes to be recorded on the App.
	Help and Support - Shows links to Aged Care Assessor App User Guide, My Aged Care Assessment Manual, AT User Guide, Terms of Use and Privacy.
 Tisha Gauthier	Profile and settings – view your profile, settings and connectivity.
	Connected – means you have connectivity to the internet. You are in an online state.
	Not connected - means you do not have connectivity to the internet. You are in an offline state. App is limited to offline functions.
	Not started – indicates the assessment has not commenced.
	Triage not started – indicates triage has not commenced.
	Triage in progress – indicates the assessment referral has entered the stage of triage.
	Reassessment – indicates the assessment referral is a reassessment.
	In progress or Assessment in progress - indicates the assessment has been started and not completed.
	

	SPR in progress – indicates the Support Plan Review has been started.
	Self-referral – indicates the assessment referral is a self-referral that you have referred to yourself.
	Client matched – indicates you have matched an offline client to an existing client once you have regained internet connection.
	Reassigned – indicates the assessment referral has been reassigned in the Assessor portal to another user.
   	Priority – depending on the client care needs, a priority for assessment is set.
	End-Of-Life – flags any IAT assessment or Support Plan Reviews that are on the End-of-life pathway.
	Aboriginal and Torres Islander Assessment Organisation – flags any client’s IAT assessment or Support Plan Review that has a preference to be assessed or reviewed by such an Assessment Organisation.
	Hospital assessment - flags any IAT assessment of Support Plan Reviews that are assessed or reviewed in a hospital.
	Clear answers or page information – selecting Clear page information will clear any information entered on the current page of the assessment that the assessor is working on.
	Help - displays more detailed information about that page or tool.
	More information – in certain areas within the app, these icons will appear to provide further information on particular questions.
	Assessor comments or Quick notes is a feature, which allows notes to be recorded on the App. These notes could be sensitive in nature or may be notes that are for later reference during the assessment process.
	Double Chevrans – these will allow you to open the side panel.
	Requires action – indicates the section of the assessment is incomplete.

	Complete – indicates the section of the assessment is completed.
	Download assessment – indicates the assessment had not been downloaded to the device yet. When downloaded, this icon will disappear.
	Upload assessment – this will upload the assessment to the My Aged Care Assessor Portal.
	Online Client - when an assessment has been matched online.
	Offline Client – when an assessment is created offline and is not matched.
Error uploading 	Error uploading – there has been an error during the uploading of the assessment referral.

Part B - IAT Assessments

! 'Assessment' in Part B refers to aged care needs assessments completed by aged care needs assessors who complete assessments using the Integrated Assessment Tool (IAT).

6. Registering a client, self-referring for assessment, starting triage and starting a review

Needs assessors can register a new client within the App.

You must be connected to the internet to view and perform any of the functions referenced below.

If you are not connected to the internet, follow the steps to [Create an offline client](#).

Following online client registration:

- Needs assessors can [self-refer clients for assessment](#) if the reason for assessment is In-hospital, remote assessment, First Nations, Homeless or at risk of, or the client is considered vulnerable.
- Referrals for reason outside of those listed above must be facilitated prior to linking to the registered client (refer to [Linking offline clients and assessments](#)).

! The following functionalities cannot be completed offline:

- registering clients (online)
- self-referring for assessment
- downloading a client's referral for assessment
- uploading assessment information to the My Aged Care assessor portal
- sharing device log data to the department.

Once the needs assessor has internet connectivity, client assessment and support plan information can be uploaded to the assessor portal.

The needs assessor can then submit to the delegate for approval (where necessary) or continue to match and refer, sending any necessary referrals for service. The client's consent must be obtained prior to any referrals being sent.

The App also enables needs assessors to register a person who may not have previously registered with My Aged Care and conduct an assessment.

! These functions are available in the assessor portal, please refer to:
[My Aged Care – Assessor Portal User Guide 1 – Registering and referring clients.](#)

6.1 Finding a client

Before you register a person, you need to confirm that they do not already have a client record.

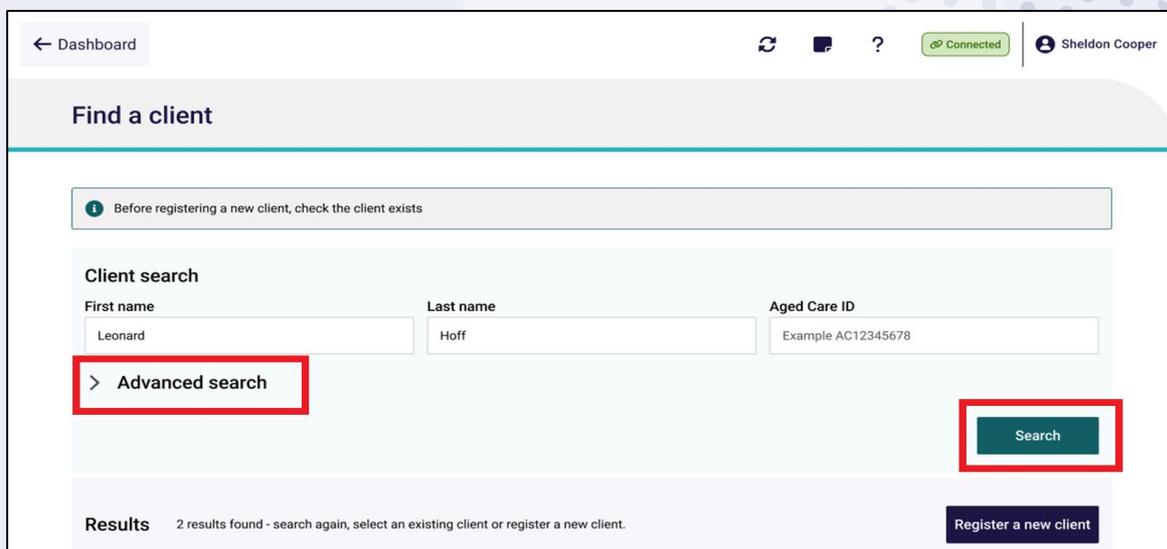
! If you are not connected to the internet, the **Find a client** function will not be available, and you can follow the steps in the **Creating an offline client** section to create a client via the **Create Offline Client** functionality.

You will then need register the client or link to an existing client when connected back to the internet.

1. Select **Find a client** from the dashboard of the App.



2. Enter the client's first name, last name and/or Aged Care User ID and select **Search**.



You can select **Advanced search** to conduct a custom or refined search.

Find a client

Before registering a new client, check the client exists

Client search

First name: Leonard
Last name: Hoff
Aged Care ID: Example AC12345678

Advanced search

Preferred name:
Date of birth: dd/mm/yyyy
Status: Select a status
Suburb:
State: Select a state

Medicare card number:
Department of Veterans Affairs (DVA) number:
Centrelink Customer Reference number (CRN):
Aged Care Management Payment System (ACMPS) number:
System for the Payment of Aged Residential Care (SPARC) number:

Search

3. Any matching search results will display.

Results 2 results found - search again, select an existing client or register a new client. Register a new client

Client Name	Status	Location	Aged Care ID	Phone	Clinical intervention due
Leonard Hofstadter	Active	Pasadena, NSW, 2157	AC12345678	02 5837 2812	18/9/2023 (14 days)
Leonard Hofstadter	In-active	Pasadena, NSW, 2157	AC12345672	04 1747 1839	-

4. If there is already an existing client record, select the appropriate record and continue from [Self-referring for assessment](#) to create a referral.

If there are **No records found** or the client record searched for is not returned in the search results, you can select **Register a new client**.

Find a client

Before registering a new client, check the client exists

First name: Cynthia (7 of 50)
Last name: Banks (5 of 50)
Aged Care ID: eg. 12345678 (0 of 8)

Advanced search

Search

No records returned Register a new client



6.2 Registering a client

Follow the steps below to register a new client in the App. You must be connected to the internet.

1. On the **Personal details** page, enter the client's personal information. Fill out all mandatory fields. These are shown by red asterisk next to the field. Red boxes provide advice on what information is required.

Register a client

* Last name
Banks

* Gender

Does the client identify as an Aboriginal or Torres Strait Islander?

Date of birth / estimated age*
Please enter the date of birth. If not known, enter the client's estimated age.
Date of Birth Estimated Age

* Date of birth

- Date of Birth age must be between 1 and 129 years old

The following fields are mandatory or invalid:

- First Name
- Date of Birth age must be between 1 and 129 years old
- Gender

2. On the **Address details** page, you can search for the client's address. If the client's address is not available from the drop-down list, you can select to enter the address manually.

Address

* Does the client have a home address?
Yes No

* Address lookup
Search for and select the address

[Can't find the address? Enter it manually...](#)

Building name
Example, 8 Furzer Street

Unit type Unit number
Select a type

Floor type Floor number
Select a type

* Street number type * Street number
Select a type

* Street type Street type suffix
Select a type

* Street name

* Suburb or City

* State or Territory * Postcode * Country
Select a region



! While you are entering client information in the **Personal details**, **Address details** and **Identity Match/Consent** sections, the App will check in real time for potential duplicate records.

Refer to [Potential Duplicates](#) for more details.

3. On the **Identity Match** page, enter in any Government ID information that the client has provided. Once all mandatory client information has been entered, select **Continue**.

The screenshot shows the 'Register a client' screen in an app. At the top, the status bar shows '3:01PM Tue 17 Sep' and '77%' battery. The app header includes a back arrow, a help icon, a 'Connected' status, and a user profile for 'Sammy Stark'. The main content area is titled 'Register a client' and contains two sections: 'Identity Match' and 'Government IDs'. The 'Identity Match' section asks 'To verify this person's identity with the Medicare System, please provide their Medicare Number. This will enable Identity Match to occur.' It includes a question 'Does this person have a Medicare Card Number?*' with 'Yes' and 'No' radio buttons. Below are input fields for 'Medicare card number' and 'Individual reference number'. A red error message states '* Please enter a valid Medicare number'. The 'Government IDs' section asks 'These government IDs will assist us with retrieving existing care approvals from DHS (if there are any). Does this person have government IDs?*' with 'Yes' and 'No' radio buttons. Below is an input field for 'Aged Care Management Payment System (ACMPS) number'.

4. You will be required to confirm the client's consent to be registered with My Aged Care.

The screenshot shows the 'Consent' dialog box overlaid on the 'Register a client' screen. The dialog box has a white background and a dark border. It contains the text 'Consent' at the top, followed by the question 'Has the client consented to register?'. Below the question are 'Yes' and 'No' radio buttons. At the bottom of the dialog box are 'Register' and 'Cancel' buttons. The background screen is dimmed, showing the 'Government IDs' section with a 'Yes' radio button selected. A 'Register' button is visible at the bottom right of the background screen.



! The **Register** button will not be enabled until all mandatory client information has been entered on the **Personal details**, **Address details** and **Identity Match** pages.

If registration is successful, you will be taken to the **Client details** page.

The screenshot shows the 'Tyra Banks's Details' page. On the left, there is a navigation menu with three items: 'About', 'Event Summary and Approvals', and 'Refer for Assessment'. The main content area is divided into several sections:

- Personal Information**: Born 1st January 1940
- Preference for First Nations Assessment Organisation to do their assessment:** Not specified
- Communication requirements**: No communication requirements provided
- Identity documents (ID)**:
 - Medicare Card Number:
 - Department of Veterans' Affairs (DVA) Card Number:
 - Centrelink Customer Reference Number (CRN):
 - Aged Care Management Payment System (ACMPS) Number:
 - System for the Payment of Aged Residential Care (SPARC) Number:
 - Aged Care ID: AC14254684
- Identity status**: Not Attempted
- Health Insurance**: No health insurance provided

6.3 Potential Duplicates

While you are entering client information prior to registration, the App will check for any potential duplicates.

Select **Review duplicate clients** to view the possible matching client records.

! If there are any potential duplicate matches found, you will be required to view these records prior to registering the new client to avoid creating a duplicate client record in My Aged Care.

The screenshot shows the 'Find a client' page. At the top, there is a search bar with the text 'Find a client'. Below the search bar, there is a 'Register a client' button. At the bottom of the page, there is a yellow warning banner with a triangle icon and the text 'Potential duplicate clients have been identified.' To the right of the banner is a black button with the text 'Review duplicate clients'.



The list of potential duplicate matches will be displayed on the left side of the screen in list view. Select each record to see a visual comparison of client details against the client record being registered.

← Leonard Hofsteader Refresh Help Connected Sheldon Cooper

Review potential duplicate client

Client details

- Leonard Hoffsteader
- Leo Hoffstead

New client		Existing client	
Title		Title	Mr
First name	Leonard	First name	Leonard
Last name	Hoffsteader	Last name	Hoffsteader
Date of birth	16 October 1962	Date of birth	16 October 1962
Home phone		Home phone	
Mobile	0418 821 812	Mobile	0418 821 812
Email	leonard.hoffsteader@bigbang.com	Email	leonard.hoffsteader@bigbang.com
Address	8 Furzer St, Woden Town Centre ACT 2606	Address	8 Furzer St, Woden Town Centre ACT 2606
Medicare		Medicare	
DVA number		DVA number	
CRN		CRN	
ACMPS		ACMPS	

If you choose to **Use new record**, continue to [Self-referring for assessment](#) or facilitate a referral for assessment.

If none of the potential duplicate matches are the client you are registering, select **Use new record** to complete the registration process.

! It is important to view any potential duplicate records prior to registering a new client to prevent the creation of duplicate client records in My Aged Care.

6.4 Self-referring for assessment

When you self-refer a client for assessment in the App, the client's referral will be assigned to you. You must be connected to the internet.

! Needs assessors can only self-refer clients if they are:

- in hospital
- conducting a remote assessment
- first Nations; or
- homeless or at risk of
- vulnerable groups.

If the client is not being self-referred for one of these reasons, the needs assessor must facilitate a referral by contacting the My Aged Care service provider and assessor helpline on 1800 836 799.

1. When you have found or registered the client you wish to self-refer for an assessment, select **Refer for assessment** from the client's record in the App.

The screenshot shows the 'Refer Abe Smith for Assessment' screen. On the left, a navigation menu has 'Refer for Assessment' highlighted with a red box. The main content area has the title 'Refer Abe Smith for Assessment'. Below the title, there is a dropdown menu labeled 'Select an outlet for referral' with 'UAT SAS Outlet' selected. Below that is a required field labeled '* Select an assessment type:' which is currently empty. At the bottom right, there is a 'Create Referral' button.

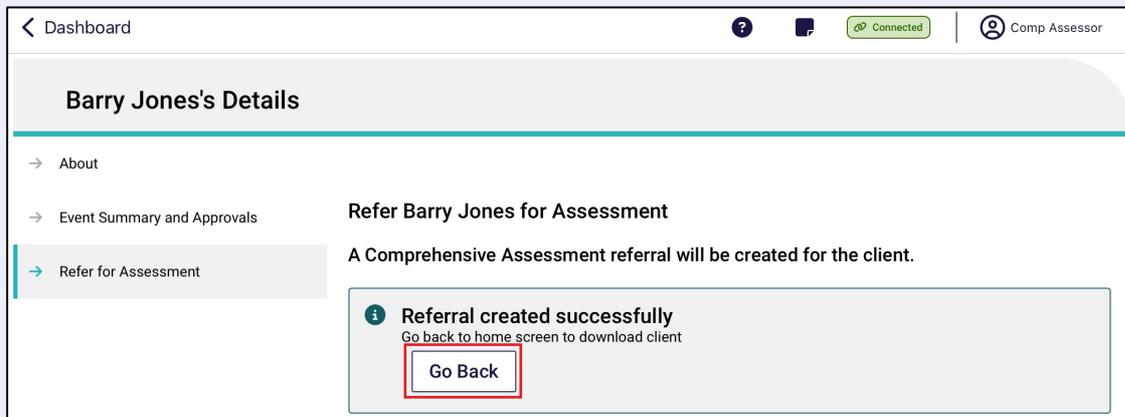
2. Select the outlet that the assessment will be associated to (if you are assigned to multiple outlets), and the assessment type. Depending on the assessment type selected additional information may be required such as the assessment setting, priority, assessment date and reason for self-referral. Once all information has been entered select **Create referral**.

The screenshot shows the 'Refer Abe Smith for Assessment' screen after some information has been entered. The 'Refer for Assessment' menu item is still highlighted. The 'Select an outlet for referral' dropdown now shows 'UAT SAS Outlet'. The '* Select an assessment type:' dropdown now shows 'Comprehensive Assessment'. Below this, there are three more required fields: '* Assessment Setting:', '* Priority:', and '* Reason for self referring:', all of which are currently empty. Information icons (i) are visible next to the 'Assessment Setting' and 'Priority' fields. At the bottom right, the 'Create Referral' button is now highlighted with a red box.



! If the client is undergoing an assessment, an error message will display, and you will be unable to refer the client for the assessment.

3. If the referral is created successfully, you can select **Go Back** to go to the Dashboard to download the client's record.

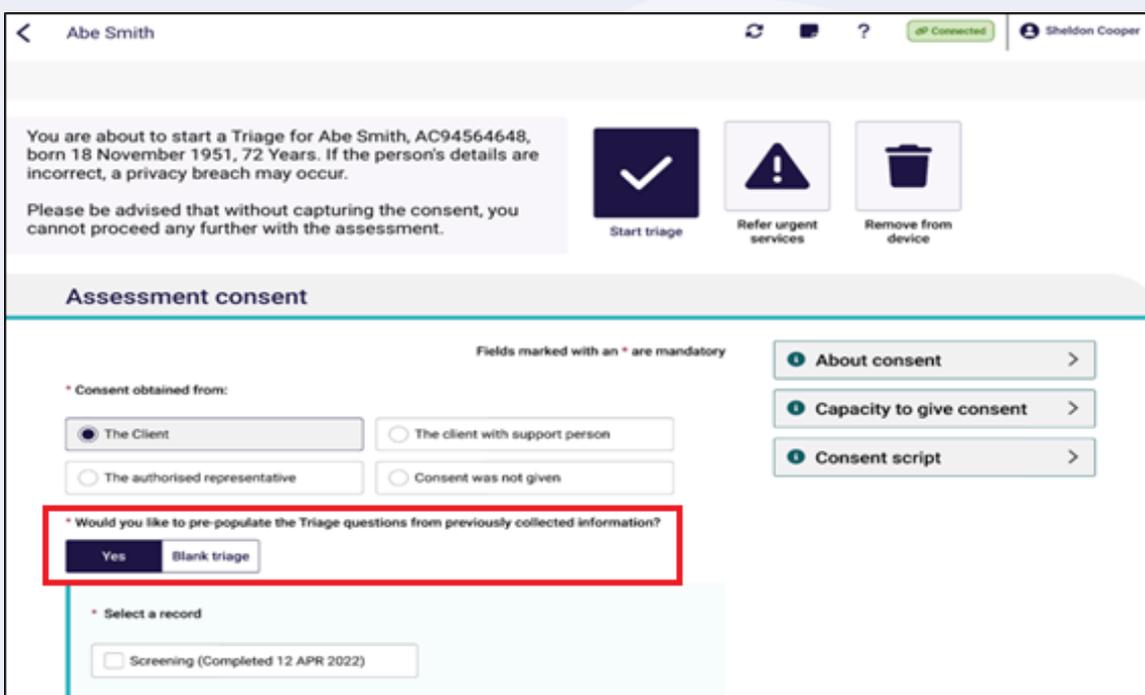


6.5 Starting Pre-Triage questions with consent for a client using the IAT (Self-Referral)

1. Before commencing an assessment, you will be required to gain consent to complete the Triage questions with the client.
2. Self-Referrals will require the Triage questions to be completed by a Triage Delegate. If you are not a Triage Delegate, you will be required to have triage supervised by a Triage Delegate.

! Assessment Organisation Triage Delegates will need to be assigned to the Triage Delegate role in the assessor portal and hold certain qualifications and certifications. For more information regarding assigning a Triage Delegate role please refer to [My Aged Care – Assessor Portal User Guide 12 – Managing delegate roles](#)

3. If there appears to be a record of the client completing the triage or screening questions previously, you can use the 'pre-populate' feature as the basis of the triage.



4. If during the triage process, the client does not provide consent to proceed, you should record this in the **Why was consent not provided?** section.

You are about to start a Triage for Jon Leibovitz, AC36643385, born 28 November 1962, 62 Years. If the person's details are incorrect, a privacy breach may occur.

Please be advised that without capturing the consent, you cannot proceed any further with the assessment.

Start Triage **Refer urgent services** **Remove from device** **Flag End-of-Life Pathway**

Assessment Consent

All fields marked with an asterisk (*) are required

Consent obtained from?

The client The client with support person

Consent was not given The supporter guardian

Why was consent not provided?

Support person not available

Client unable to consent

Other, please specify

Assessment no longer required

Revoked by supporter

About consent **Capacity to give consent** **Consent script**

Confirm

5. You will also need to confirm that you have confirmed with the client that if consent is not provided, that the assessment will not be continued and that the assessment referral will be rejected.

Assessment Consent

All fields marked with an asterisk (*) are required

Supporter not available

Confirmation
If the client does not consent then this will result in the referral being rejected. Ensure the correct value is chosen before continuing.

Back **Continue**

* Comments

Comments here

13 of 255

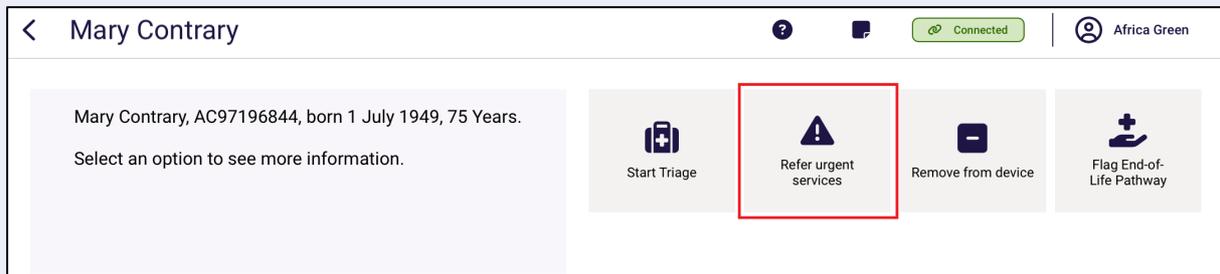
Confirm



6.6 Refer urgent services before completing Triage

Before commencing the Triage questions, you will have the option to refer the client for urgent services before you can recommend for Support at Home and other services if required.

1. Before starting a triage, select the **Refer Urgent Services** button.

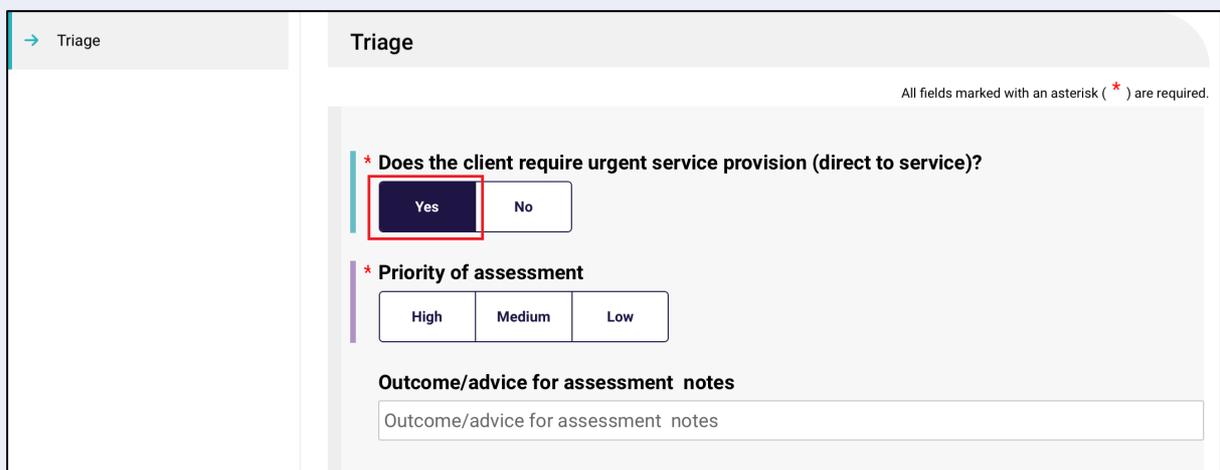


Mary Contrary

Mary Contrary, AC97196844, born 1 July 1949, 75 Years.
Select an option to see more information.

Start Triage | **Refer urgent services** | Remove from device | Flag End-of-Life Pathway

Alternatively, [once the triage has started](#), in the Triage page, Select **Yes** to **Does the client require urgent service provision (direct to service)?**



Triage

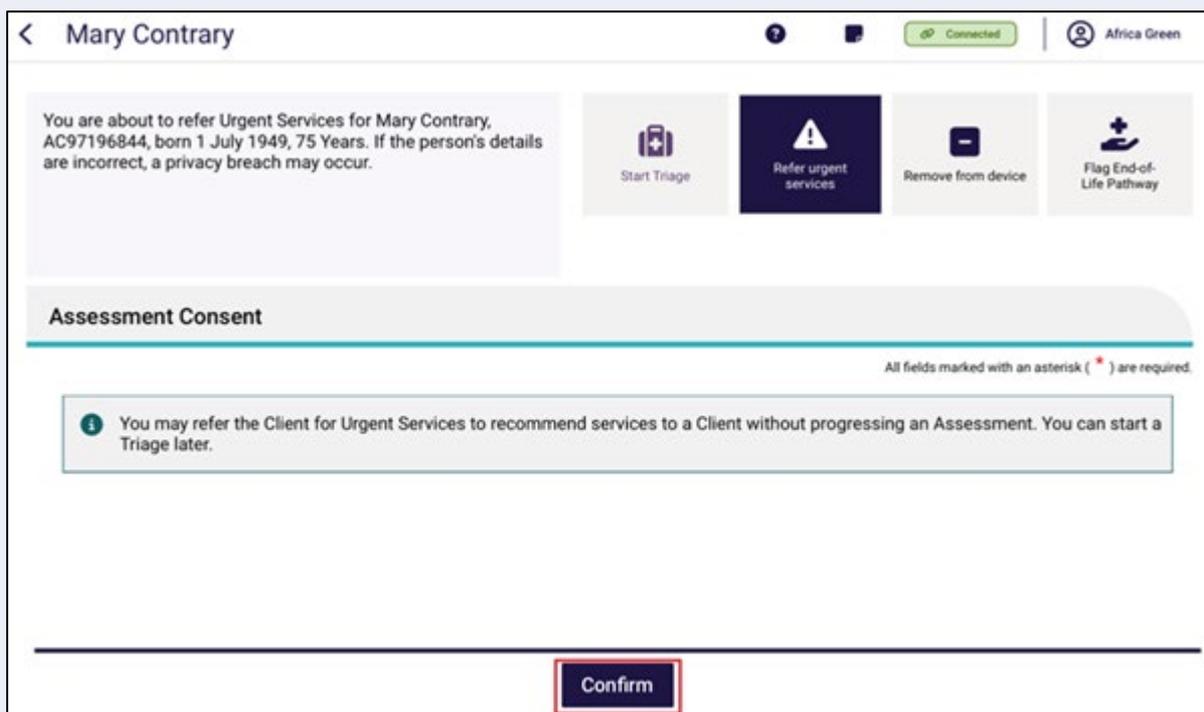
All fields marked with an asterisk (*) are required.

* Does the client require urgent service provision (direct to service)?
Yes No

* Priority of assessment
High Medium Low

Outcome/advice for assessment notes
Outcome/advice for assessment notes

2. Once you have selected the button, you will be asked to **Confirm** that you are wanting to proceed to refer the client for urgent services without progressing an assessment. Please note that you can start and complete the triage questions later.



Mary Contrary

You are about to refer Urgent Services for Mary Contrary, AC97196844, born 1 July 1949, 75 Years. If the person's details are incorrect, a privacy breach may occur.

Start Triage | **Refer urgent services** | Remove from device | Flag End-of-Life Pathway

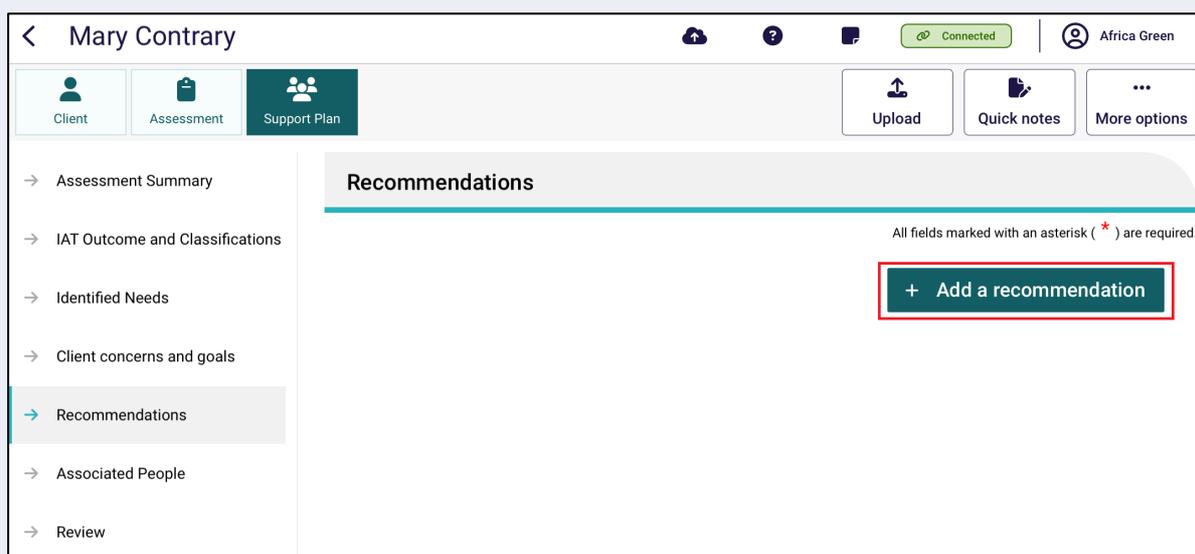
Assessment Consent

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

i You may refer the Client for Urgent Services to recommend services to a Client without progressing an Assessment. You can start a Triage later.

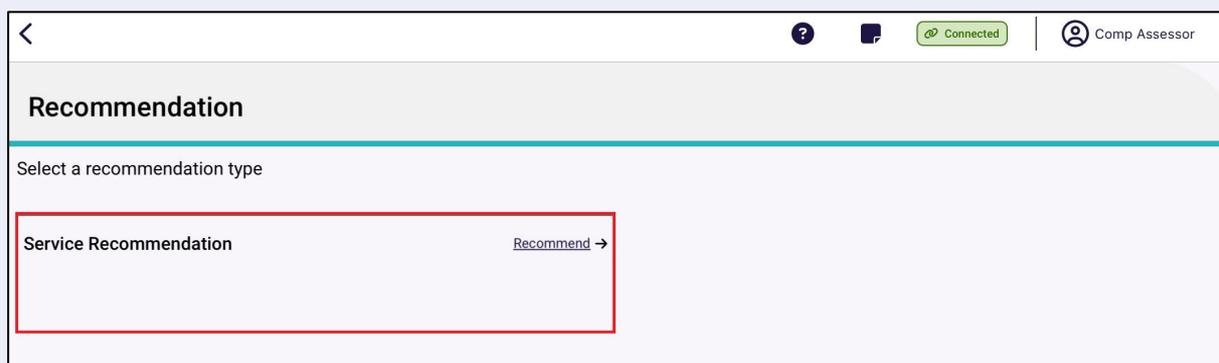
Confirm

3. Once you have selected **Confirm**, the support plan's **Recommendations** section will appear where you can select **+ Add a recommendation**.



The screenshot shows the 'Mary Contrary' support plan interface. The top navigation bar includes a back arrow, the name 'Mary Contrary', and user information 'Africa Green'. Below the navigation bar are tabs for 'Client', 'Assessment', and 'Support Plan'. The 'Support Plan' tab is active. On the right side, there are buttons for 'Upload', 'Quick notes', and 'More options'. The main content area is titled 'Recommendations' and contains a list of menu items: 'Assessment Summary', 'IAT Outcome and Classifications', 'Identified Needs', 'Client concerns and goals', 'Recommendations' (highlighted), 'Associated People', and 'Review'. A red box highlights the '+ Add a recommendation' button. A note at the top right states: 'All fields marked with an asterisk (*) are required.'

4. Select the hyperlink **Recommend** next to **Service Recommendation**.



The screenshot shows the 'Recommendation' form. The title is 'Recommendation'. Below the title, it says 'Select a recommendation type'. There is a red box around the 'Service Recommendation' option, which has a 'Recommend' link with a right-pointing arrow next to it.

5. Select **Service type** to display a drop down menu, then from the list displayed, select the service type required for urgent services.

Once a service type is selected, the services related to that service type is displayed. For example, Nursing Care contains three services: Registered nurse clinical care, Enrolled nurse clinical care, and Nursing assistant clinical care. Select one or more services required.

! For more information on the services available in the *Aged Care Act (2024)* refer to [New Aged Care Act resources for aged care assessors | Australian Government Department of Health, Disability and Ageing](#) .

Adding a Service Recommendation

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

* Service type
Nursing care

Services

Registered nurse clinical care Enrolled nurse clinical care

Nursing assistant clinical care

Done

Home maintenance and repairs
Home or community general respite
Meals
Nursing care
Personal care
Social support and community engagement
Specialised support services

- Complete all mandatory fields for the service recommendation, including: Service type, Priority, Recommended start date, Recommended review date, and Recommended end date.
- Fields marked with a red asterisk are mandatory. After completing all relevant fields, select **Save**.

Adding a Service Recommendation

Fields marked with an * are mandatory

* Service type
Nursing

* Priority
Low Medium High

Recommended service intensity ⓘ
[Empty input field]

Recommended service frequency ⓘ
[Empty input field]

* Recommend a start date

Save Cancel

6.7 Starting Triage questions with client (Self-Referral)

1. To complete the Triage stage, select **Assessment**. Complete the triage questions based on the information provided to you by the client.

The screenshot shows the user interface for client Lam Mary. The top navigation bar includes a back arrow, the client name 'Lam Mary', a 'Connected' status indicator, and the user's name 'Africa Green'. Below this is a menu with 'Client', 'Assessment' (highlighted with a red box), and 'Support Plan'. Further right are buttons for 'Complete Triage', 'Upload', 'Quick notes', 'Clear page information', and 'More options'. A yellow banner states 'You are conducting a Self Referral Assessment'. The main content area is titled 'Triage' and includes a note: 'All fields marked with an asterisk (*) are required.' The 'Date of Triage' is set to '19 May 2025'. A section titled '* Registration screen information collected from' contains a grid of checkboxes for various roles: Client, Client's carer, family member and/or other, Client's representative/supporter, Client's General Practitioner, Representative of service provider, Health professional, Aboriginal Liaison Officer, Aged care connector and co-ordinator, Care finder, Via interpreter, Agent, and Other.

2. If you do not hold a Triage Delegate role, enter the details of the Triage Delegate who supervised you to complete triage.

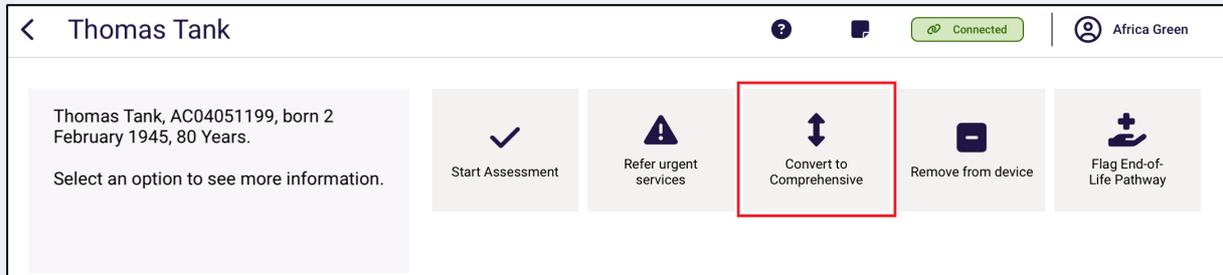
Then select **Complete Triage**.

The screenshot shows the user interface for client Ana Smith. The top navigation bar includes a back arrow, the client name 'Ana Smith', a 'Connected' status indicator, and the user's name 'Elisha Burns'. Below this is a menu with 'Client', 'Assessment', 'Support Plan', and 'Complete Triage' (highlighted with a red box). Further right are buttons for 'Upload', 'Quick notes', 'Clear page information', and 'More options'. A yellow banner states 'You are conducting a Self Referral Assessment'. The main content area is titled 'Triage' and includes a note: 'All fields marked with an asterisk (*) are required.' The 'Priority of assessment' is set to 'Medium'. The 'Outcome/advice for assessment notes' field is empty. A section titled 'Details of the supervised Triage' contains a field for '* Triage supervised by' (highlighted with a red box).

6.8 Converting assessments after completing Triage

After triage has been completed, needs assessors will have the ability to convert a home support assessment recommendation to a comprehensive assessment if it is in their expert opinion that the client requires it based on the information provided during triage.

1. After completing triage select **Convert to Comprehensive**.



Thomas Tank

Thomas Tank, AC04051199, born 2 February 1945, 80 Years.

Select an option to see more information.

Start Assessment

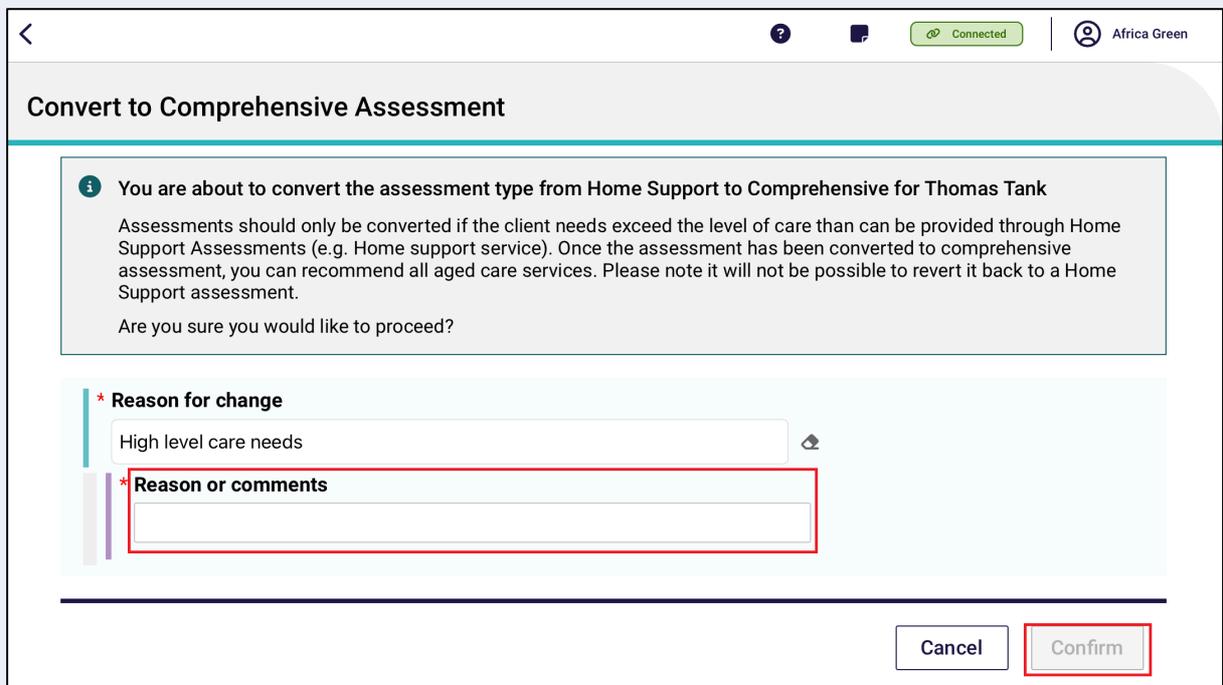
Refer urgent services

Convert to Comprehensive

Remove from device

Flag End-of-Life Pathway

2. The reason for change will be defaulted to High level care needs. Enter additional information regarding the reason in the **Reason or comments** field and then select **Confirm**.



Convert to Comprehensive Assessment

You are about to convert the assessment type from Home Support to Comprehensive for Thomas Tank

Assessments should only be converted if the client needs exceed the level of care than can be provided through Home Support Assessments (e.g. Home support service). Once the assessment has been converted to comprehensive assessment, you can recommend all aged care services. Please note it will not be possible to revert it back to a Home Support assessment.

Are you sure you would like to proceed?

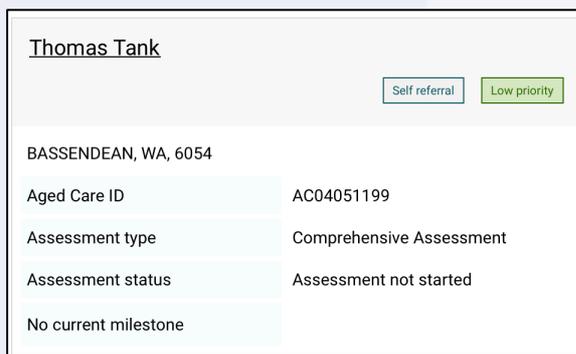
* Reason for change

High level care needs

* Reason or comments

Cancel Confirm

3. The assessment will then be converted to a comprehensive assessment. To confirm, go back to the dashboard and refresh the client card.



Thomas Tank

Self referral Low priority

BASSENDAN, WA, 6054

Aged Care ID AC04051199

Assessment type Comprehensive Assessment

Assessment status Assessment not started

No current milestone



7. Referrals, reviews and creating an offline client for assessment

Client referrals can be downloaded for all referrals that have been assigned to you in the assessor portal. When downloaded to your device, the assessment, client profile, notes tab and attachments tab will pre-populate with information collected during screening and previous assessments (if applicable).

Similarly, client reviews can be downloaded for all reviews that have been assigned to you.

An internet connection is needed to download client referrals and reviews to a compatible device. The App can store up to 50 clients at any one time.

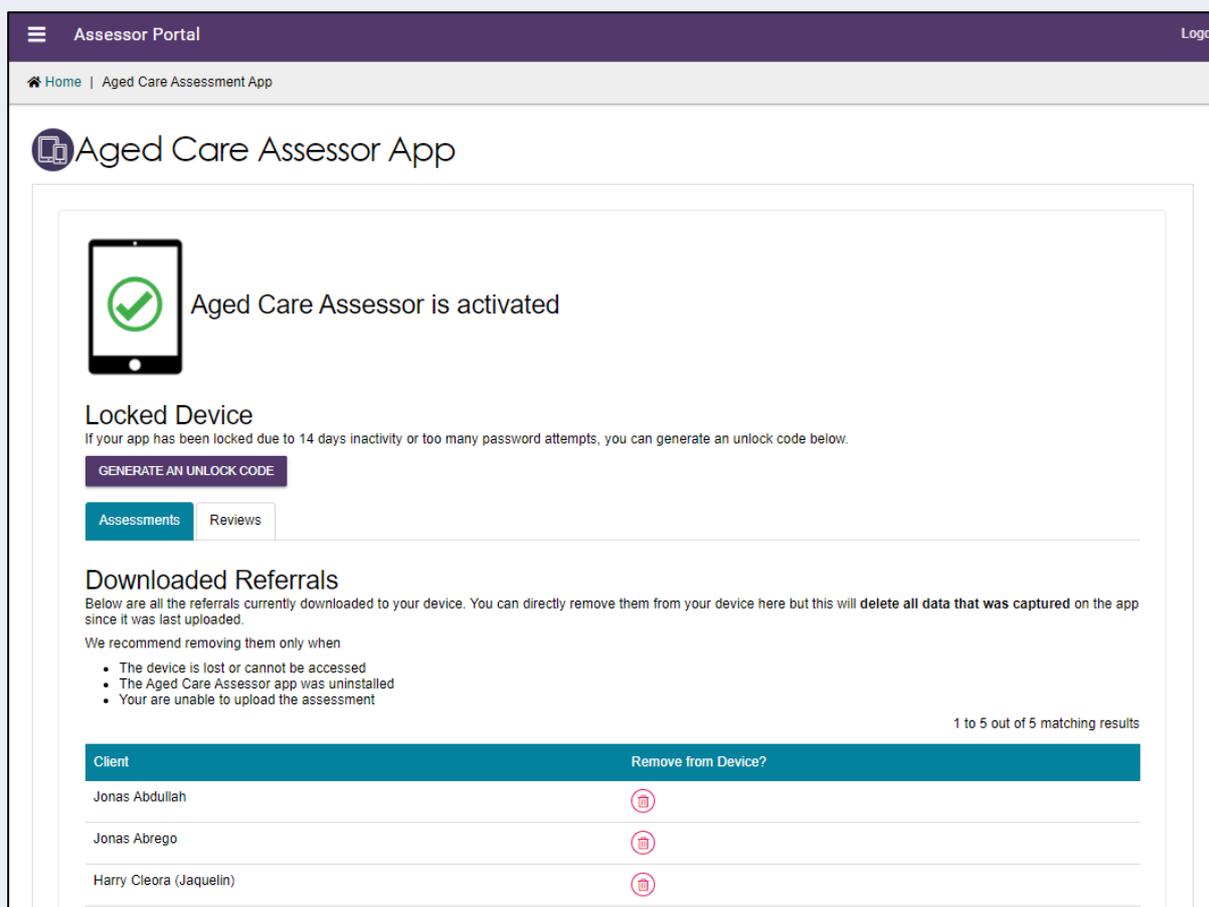
You can also create and save an offline client to your device whilst offline and conduct an assessment and commence a support plan. However, you will require an internet connection to conduct a review.

Once re-connected to the internet, the [offline client can be registered](#) or [linked to an existing client](#), prior to uploading the assessment and support plan information to the assessor portal.

! When you download a client's referral or review to your device, the client record and the assessment will be locked in the assessor portal and remain locked until you [Upload the assessment or review](#), or if you remove the referral/review from your device.

Referrals and reviews can be removed via the App or the assessor portal.

Any client referrals and reviews that are downloaded to your device will appear in the App section of the assessor portal, under **Downloaded Referrals**.



The screenshot shows the 'Assessor Portal' interface. At the top, there is a navigation bar with a menu icon, the text 'Assessor Portal', and a 'Logout' link. Below the navigation bar, there is a breadcrumb trail: 'Home | Aged Care Assessment App'. The main content area features the 'Aged Care Assessor App' logo and a status message: 'Aged Care Assessor is activated' with a green checkmark icon. Below this, there is a 'Locked Device' section with a sub-message: 'If your app has been locked due to 14 days inactivity or too many password attempts, you can generate an unlock code below.' and a 'GENERATE AN UNLOCK CODE' button. There are two tabs: 'Assessments' (selected) and 'Reviews'. The 'Downloaded Referrals' section follows, with a sub-message: 'Below are all the referrals currently downloaded to your device. You can directly remove them from your device here but this will delete all data that was captured on the app since it was last uploaded.' and a note: 'We recommend removing them only when' followed by a bulleted list: 'The device is lost or cannot be accessed', 'The Aged Care Assessor app was uninstalled', and 'Your are unable to upload the assessment'. A '1 to 5 out of 5 matching results' indicator is present. Below the list, there is a table with two columns: 'Client' and 'Remove from Device?'. The table contains three rows of client data.

Client	Remove from Device?
Jonas Abdullah	
Jonas Abrego	
Harry Cleora (Jaquelin)	

! A person with the Team Leader role in the assessor portal can reassign client referrals that have been downloaded.

If a downloaded referral is reassigned to another assessor, any data entered on the device whilst offline will not be able to be uploaded and will be discarded by the App. To retain data entered offline, upload the assessment to the assessor portal prior to re-assigning the referral.

Needs assessors will also receive a notification in the assessor portal informing them when a downloaded referral has been re-assigned to another assessor.

7.1 Navigating between referrals and reviews

The App's dashboard will display your assessment outlet/s referrals and their statuses:

- Triage
- Urgent Services
- Not started
- In progress
- Review.

To navigate between each view, use the side menu.

1. After logging in to the app, the Dashboard page displays. Select the outlet to open and view your referrals.

UAT SAS Outlet Due in 2 days

Triage Not Started	2
Urgent Services Pending Triage	1
Triage In Progress	2
Assessment Not Started	0
Assessment In Progress	1
SPR In Progress	0
SPR Not Started	0

2. Once selected, the view will display all referrals for that outlet.

Dashboard > Filters 7 assessments, sorted by Client Last Name

Client Name	Location	Aged Care ID	Assessment type	Assessment status	Completed Triage due by
Test Client			Home Support Assessment	Triage not started	
Aaron Jones	CRONULLA, NSW, 2230	AC19537430	Home Support Assessment	Triage in progress	21/09/2024 (4 days overdue)
Ace Sharp	KURRI KURRI, NSW, 2327	AC48348551	Comprehensive Assessment	In progress	20/09/2024 (5 days overdue)
Aadi Smith	GLEN INNES, NSW, 2370	AC92092113	Home Support Assessment	Triage not started	21/09/2024 (4 days overdue)

3. To filter referrals, select the **Filter** drop-down. You can filter referrals by:

- Keyword
- Order
- Status
- Priority
- Assessment type

Dashboard > Big Bang Aged Care (9 IAT Assessments)

Filter

Keyword

Order: Last name A to Z
 Status: Select a status
 Priority: Select priority
 Assessment type: Select a type

[Clear filters](#)

Client Name	Location	Aged Care ID	Assessment type	Clinical intervention due
Penny Teller	Bonner, ACT, 2914	AC12345678	Residential respite	18/9/2023 (14 days)
Leonard Hofstadter	Pasadena, NSW, 2157	AC12345678	Home support	18/9/2023 (14 days)
Howard Wolowitz	Maryborough, QLD, 4567	AC12345678	Comprehensive	18/9/2023 (14 days)



7.2 Downloading a client's referral or review

Follow the below steps to download a client's referral for assessment or support plan review. You must be connected to the internet.

1. Open and [log in to the app](#) with your password.
2. The Dashboard page displays. Select your outlet. In your outlet, client referrals and review cards will appear together in alphabetical order (by last name). Referrals for Comprehensive, Home Support, Residential Respite assessments and Support Plan Reviews can be identified by the referral **Assessment type** field.

The screenshot shows a dashboard with a header 'Dashboard' and a user profile 'Sammy Stark'. Below the header, there are filters for '7 assessments, sorted by Client Last Name'. The main content area displays four client cards: 'Test Client', 'Aaron Jones', 'Ace Sharp', and 'Aadi Smith'. Each card shows details like 'Aged Care ID', 'Assessment type', 'Assessment status', and 'Completed Triage due by'. The 'Assessment type' field for 'Aadi Smith' is highlighted with a red box, showing 'Home Support Assessment'. On the right side of the dashboard, there are three buttons: 'Sync Referrals', 'New Assessment', and 'Backup Assessments'.

3. To ensure that you are viewing the most up to date list of referrals/reviews assigned to you, select **Sync Referrals** on the righthand side of the page when you are connected to the internet. If you cannot view the client's referral/review card on the Dashboard, ask your Team Leader to ensure it has been assigned to you, or refer to the [Troubleshooting and diagnostics](#) section.

The screenshot shows a dashboard with a header 'Dashboard' and a user profile 'Comp Assessor'. Below the header, there are filters for '16 assessments, sorted by Client Last Name'. The main content area displays six client cards: 'Harry Jones', 'Harry Miller', 'Harry Nichols', 'Brook Resp', 'Club RespY', and 'UATFred RTAGT...'. Each card shows details like 'Aged Care ID', 'Assessment type', 'Assessment status', and 'Completed Triage due by'. The 'Assessment type' field for 'Harry Nichols' is highlighted with a red box, showing 'Comprehensive'. On the right side of the dashboard, there are three buttons: 'Sync Referrals', 'New Assessment', and 'Backup Assessments'.



! The visual indicator on the referral card identifies how a referral is tracking against the next relevant Key Performance Indicator (KPI) milestone (for example - completed support plan or finalised support plan).

4. Locate the client referral/review card you want to download, then select the Download icon.

Eyad Christian 

Hospital Self referral Low priority

Aged Care ID	AC77228807
Assessment type	Comprehensive
Assessment status	In progress
Completed Support Plan due by	06/02/2025 (244 days overdue)

5. Once selected, the downloaded assessment will show the progress of downloading this to the device. When all are downloaded, select **+ Open assessment**.

Download assessment for Aadi Smith

Step	Progression
 Download Client Details	Downloaded
 Download Client Notes	Downloaded
 Download First Intervention	Downloaded
 Download Client Approvals	Downloaded
 Download Assessment	Downloaded
 Download Support Plan	Downloaded

+ Open assessment Close

If the download fails, it will show a status of Failed. It will give you the option to either try again or download it later.

Download assessment for Aaron Jones

Step	Progression
<input checked="" type="radio"/> Download Client Details	Failed to download
<input type="radio"/> Download Client Notes	Ready for download
<input type="radio"/> Download First Intervention	Ready for download
<input type="radio"/> Download Client Approvals	Ready for download
<input type="radio"/> Download Assessment	Ready for download
<input type="radio"/> Download Support Plan	Ready for download

The assessment failed to download. Please try again or contact My Aged Care service provider and assessor helpline on 1800 836 799 if problems persist.

 Try again

I'll do it later

6. When downloading referral cards, you will be asked if you want to pre-populate the assessment with the latest assessment or screening information.

On the next screen you will be asked if you would like to pre-populate the IAT questions from previously collected information.

* Would you like to pre-populate the IAT questions from previously collected information?

Yes

Blank assessment

Confirm

Select **Yes** or **Blank Assessment**. If you select **Yes**, the assessment form will be populated with the information contained in either the latest assessment or the screening if an assessment has not been captured. You will be able to select which assessment information to use. Once selected, click **Confirm**.

* Would you like to pre-populate the IAT questions from previously collected information?

Yes

Blank assessment

* Select a record

Comprehensive (Completed 06 June 2024)

Confirm



! A needs assessor only can select whether they would like to start the assessment pre-populated or as a blank assessment once.

A needs assessor will still have the ability to clear page information from within the assessment.

7. Once you have selected the client referral card a download window will appear. You can view the progress of the download.

When the client's referral/review has successfully downloaded, the download icon will disappear, and when you select the client card you will have the option to **Start triage**, **Refer urgent services** to commence their assessment or review. You will also be able to **Remove from device**, or **Flag End-Of-Life Pathway**.

You will now be able to:

- view client information ([Viewing and adding client information](#))
- set up support relationships ([Registering a support person](#))
- complete identity verification ([Completing identity verification](#)); and either
- conduct triage ([Completing Triage questions](#)); and
- conduct the assessment ([Undertaking assessments](#)), or
- conduct a review ([Conducting support plan reviews](#)).

7.3 Creating an offline client

You can complete an offline assessment for a client who is not assigned to you in the assessor portal by creating and saving a client record locally to your device.

This could occur in a variety of circumstances; for instance, you are in a client's home undertaking an assessment offline and you determine that their partner or someone else living at the same address, who may not be registered with My Aged Care, also requires an assessment.

This function is not available with support plan reviews.

To create an offline client on the App whilst offline, follow the steps below.

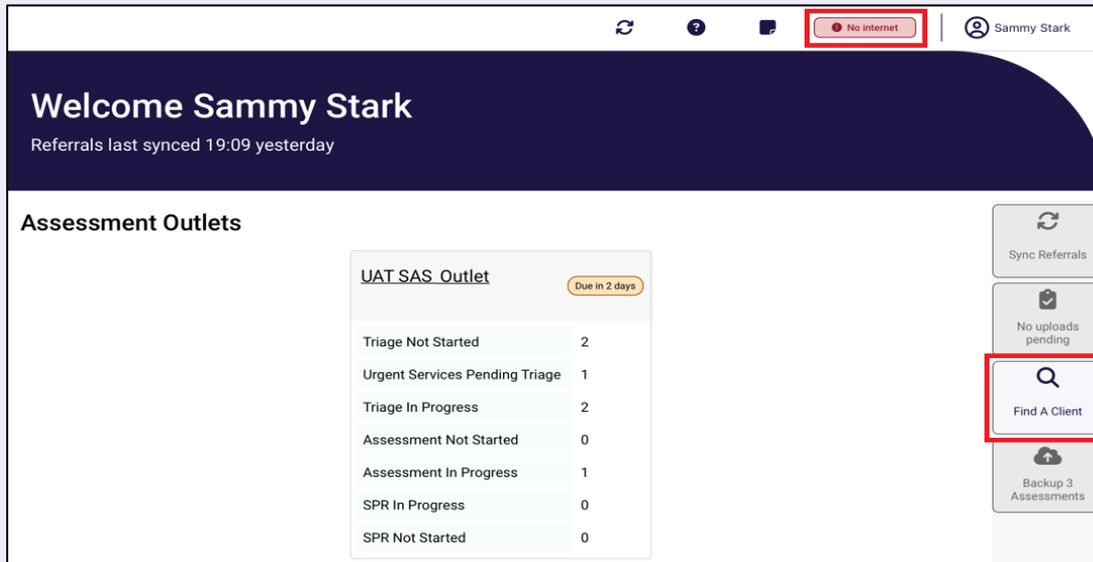
! Where possible, you should always attempt to confirm whether a person is registered with My Aged Care prior to creating an offline client in the App. If a client already has an assessment in progress, you will not be able to refer this client to your outlet and consequently be unable to upload and complete the assessment.

If the client has not been referred to you and does not have an in-progress assessment, and you can:

- Refer this client to yourself in the assessor portal if the reason for the assessment is either **In-hospital**, **remote assessment**, **First Nations** or **Homeless or at risk of**. This process is described in the [Assessor Portal User Guide 1 – Registering and referring clients for assessments](#).
- Facilitate a referral for the client to your organisation for a reason outside those listed above by calling the My Aged Care service provider and assessor helpline on 1800 836 799. This must be done before you can upload the assessment to the assessor portal. You can still undertake the assessment offline if no internet connection is available.

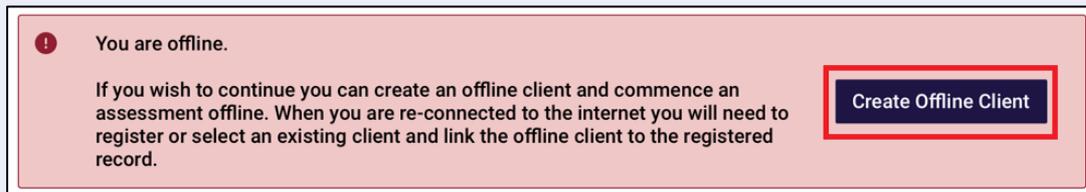
1. Open and [log in to the App](#) with your password. The Dashboard displays with your outlet and referrals. Note the Connectivity indicator on the top right of the screen is showing a red **No Internet** connection icon with a chain, which means the app is disconnected from the internet.

Select **Find A client** on the right hand side of the Dashboard.



2. A message will display notifying you that you are not connected to the internet.

Select **Create Offline Client**.



3. A blank client record will be displayed. Enter all mandatory client details as indicated by a red asterisk on the right. Select **Save** to save the client locally to your device.

Register a client

Yes NO

Identity Match

To verify this person's identity with the Medicare System, please provide their Medicare Number. This will enable Identity Match to occur.

Does this person have a Medicare Card Number?*

Yes No

Government IDs

These government IDs will assist us with retrieving existing care approvals from DHS (if there are any).

Does this person have government IDs?*

Yes No

Save



- Select an Assessment type for the client from the drop-down menu and the Outlet that you want to assign to complete, then select **Save**.

Assessment details

Select an Assessment type and Outlet

Assessment type *

Comprehensive Assessment

Outlet *

UAT SAS trial Outlet

Save

Cancel

- The offline client's referral will display on the Dashboard. Select the Outlet and the client's record will be displayed. You will now be able to:
 - enter additional client profile information ([Viewing and adding client information](#))
 - undertake triage (if a Triage Delegate)
 - undertake an assessment ([Undertaking assessments](#)); and
 - commence developing the client's support plan ([Developing a support plan](#)).

← Dashboard
Big Bang Aged Care (9 IAT Assessments)
🔄 📄 ?
No internet
👤 Sheldon Cooper

Filter

Keyword

🔍 Name or ID

Order

Last name A to Z

Status

Select a status

Priority

Select priority

Assessment type

Select a type

[Clear filters](#)

⚠️ You will be unable to download clients to this device while you are offline.

Penny Teller

High priority Self-referral

Bonner, ACT, 2914

Aged Care ID AC12345678

Assessment type Residential respite

Clinical intervention due 18/9/2023 (14 days)

Leonard Hofstadter

High priority Triage Completed

Pasadena, NSW, 2157

Aged Care ID AC12345678

Assessment type Home support

Clinical intervention due 18/9/2023 (14 days)

Howard Wolowitz

High priority In progress Self-referral

Maryborough, QLD, 4567

Aged Care ID AC12345678

Assessment type Comprehensive

Clinical intervention due 18/9/2023 (14 days)

Raj Koothappali

Medium priority Closed Pending closure

Pasadena, NSW, 2157

Aged Care ID AC12345678

Assessment type Home support

Clinical intervention due 18/9/2023 (14 days)

Amy Farrah Fowler

Medium priority In progress

Maryborough, QLD, 4567

Aged Care ID AC12345678

Assessment type Comprehensive

Clinical intervention due 18/9/2023 (14 days)

Penny Teller

Urgent

Bonner, ACT, 2914

Aged Care ID AC12345678

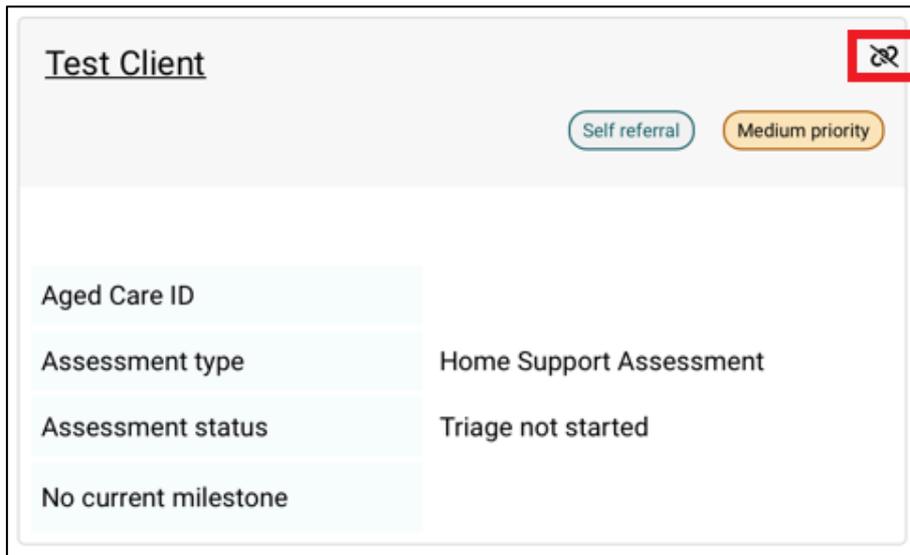
Assessment type Support Plan Review

Review Type Ad-hoc

Backup assessments

Find a client

! Clients created offline will have a visual indicator to identify that they have been created locally to the device.

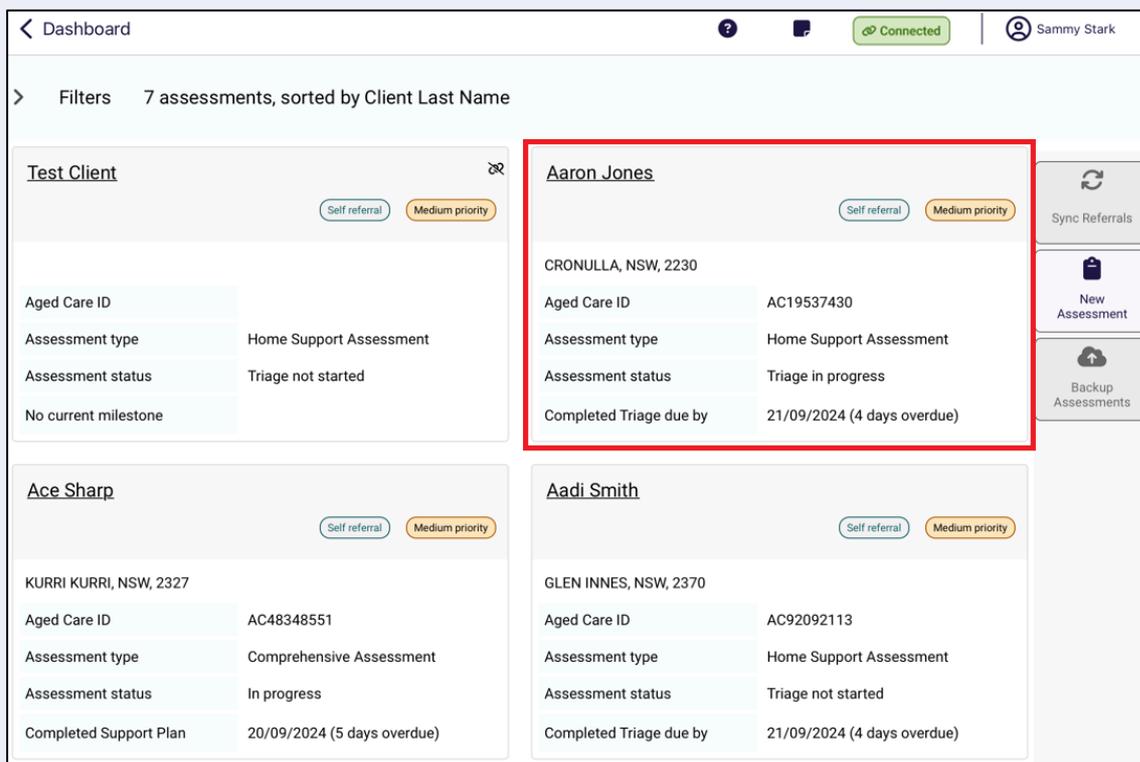


8. Viewing and adding client information

You can view client information previously collected for downloaded assessment referrals, downloaded support plan reviews or offline clients (saved locally to the device using the [Creating an offline client](#) process).

To view client information:

1. Open and [log in to the App](#).
2. The dashboard page displays. Select your outlet. Once in the outlet, select the client's name in the client card to navigate to the client's details.



3. The **Client Profile** page displays.

Alternatively, you can access client details within the client's assessment or review by selecting the client link at the top left corner of the page.

You can toggle between the client, assessment and support plan without losing any information.

! The following screenshots are from a downloaded assessment referral. The client information is the same when in a downloaded support plan review.

The **Client profile** page contains information from the client record including:

- personal information (name, date of birth, etc.)
- communication requirements
- identity documents
- identity status
- health insurance.

! Client profile information can be edited from this section. Any information that is updated from the App will overwrite the profile information that is in the client record when uploaded to the assessor portal.

The screenshot shows the 'Client profile' page for Leonard Hofstader. The top navigation bar includes 'Client', 'Assessment', and 'Support plan' tabs, with 'Client' selected. The main content area has a 'Client profile' section with the following fields: Title (Mr), First name, Middle name, Last name, and Date of birth. The 'Date of birth' field has a calendar icon. The 'Client' tab is highlighted in the top navigation bar.

! When all mandatory client profile information has been completed, a tick will appear next to the section. This information must be completed to generate assessment outcomes at the completion of the assessment.

The screenshot shows the 'Client profile' page with the 'Client Profile' section highlighted with a tick mark, indicating it is completed. The 'Contact Details' section is also visible below it.

8.1 Contact Details

The **Contact details** page displays the client's contact information, mobile and home numbers, email address, preferred contact method and address details. Needs assessors can add and/or edit contact information and configure notification preference (SMS and/email) in the **Contact details** section. To prompt SMS notifications for a client and their support network or supporter, follow the steps below.

1. Obtain Consent to send SMS and email about the client, then add mobile phone number. Select the **Verify** button. This will send a six digit code to the recipient's mobile number.

← Leonard Hofstader

Client Assessment Support plan

Sync data Notes More options

Contact details

Home phone number:

Consent to send SMS and emails about the client?

Yes No

Mobile phone number:

Australia +61 04134543234 Verify

*Unverified

Email:

testemail@hotmail.com

Notify by email:

Notify by SMS:

Other contact details

No contact details provided

Assessment information

Home address: 123 Northbourne Ave, Braddon, ACT 2900

Service delivery address: 123 Northbourne Ave, Braddon, ACT 2900

Send any correspondence to: 123 Northbourne Ave, Braddon, ACT 2900

2. Enter the six digit code and select **Confirm code**.

< Harry Goff

Client Assessment Support Plan

Upload More options

Contact Details

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

Enter verification code

A six digit code has been sent to Harry Goff's mobile phone number, . Please enter it in the space below.

Cancel Regenerate code Confirm code

Home phone number

Consent to send SMS and emails about the client

Yes No

Mobile phone number

Australia +61 Verify

0/1



- Once the number has been verified, to set SMS notification toggle on **Notify by SMS**. To remove a preference you can select the toggle to remove the preference.

← Leonard Hofstader

Client Assessment Support plan Sync data Notes More options

→ Client profile

→ **Contact details**

→ Support network and coinhabitants

→ Wallet check

→ Event summary and approvals

→ Attachments

→ Notes

Contact details

Home phone number:

Consent to send SMS and emails about the client?

Yes No

Mobile phone number:

Australia +61 04134543234 Verify

Email: testemail@hotmail.com

Notify by email:

Notify by SMS:

Other contact details

No contact details provided

8.2 Support Network and Cohabitants

The **Support Network and Cohabitants** page displays the client's supporters, the people they support and other relationships (the support network). The process for setting up support network relationships is explained in [Registering a support person](#) section.

← Stella Stacey

Client Assessment Support Plan Upload Quick notes More options

Client Profile

Contact Details

Support Network and Cohabitants

Wallet check

Event summary and Approvals

Attachments

Notes

Support Network and Cohabitants

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

Refresh relationships Last updated 9:49 AM 20/05/2024 Create Relationship

Supporters

> Mary Lamb - Supporter Guardian Remove

Supporter Organisations

No relationships found

Agent Organisations

> MONASH HEALTH - Agent (Care finder) Remove

People that Stella Stacey supports

No relationships found

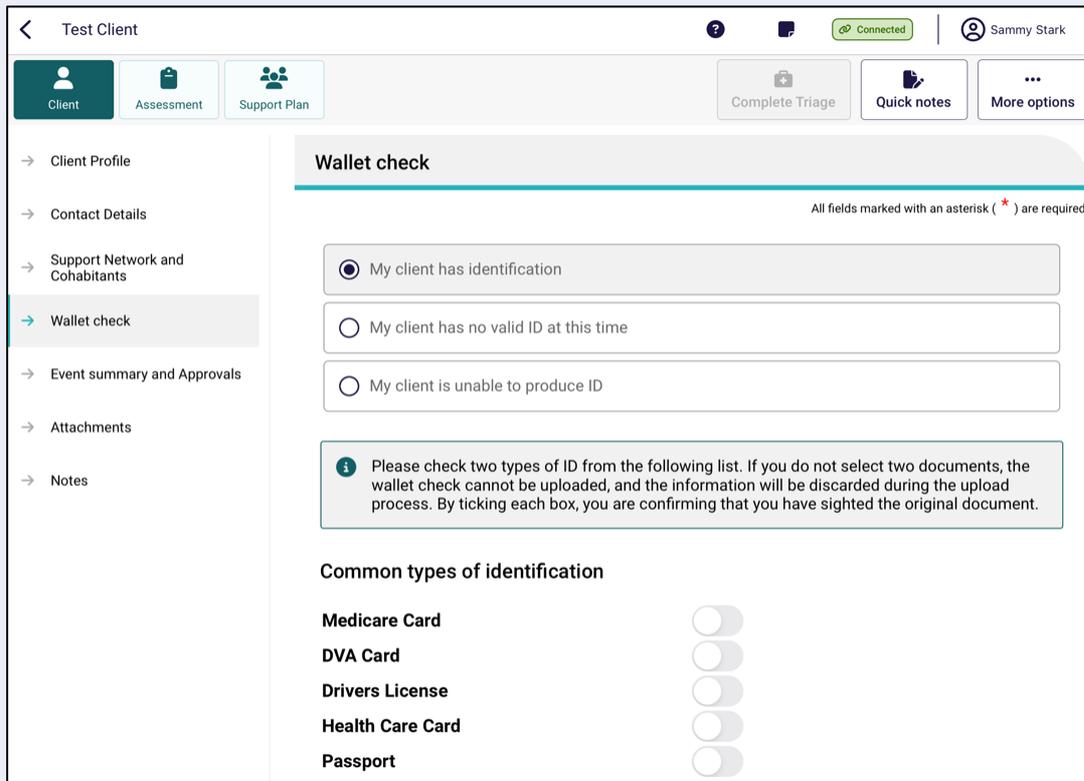
Other Relationships

No relationships found



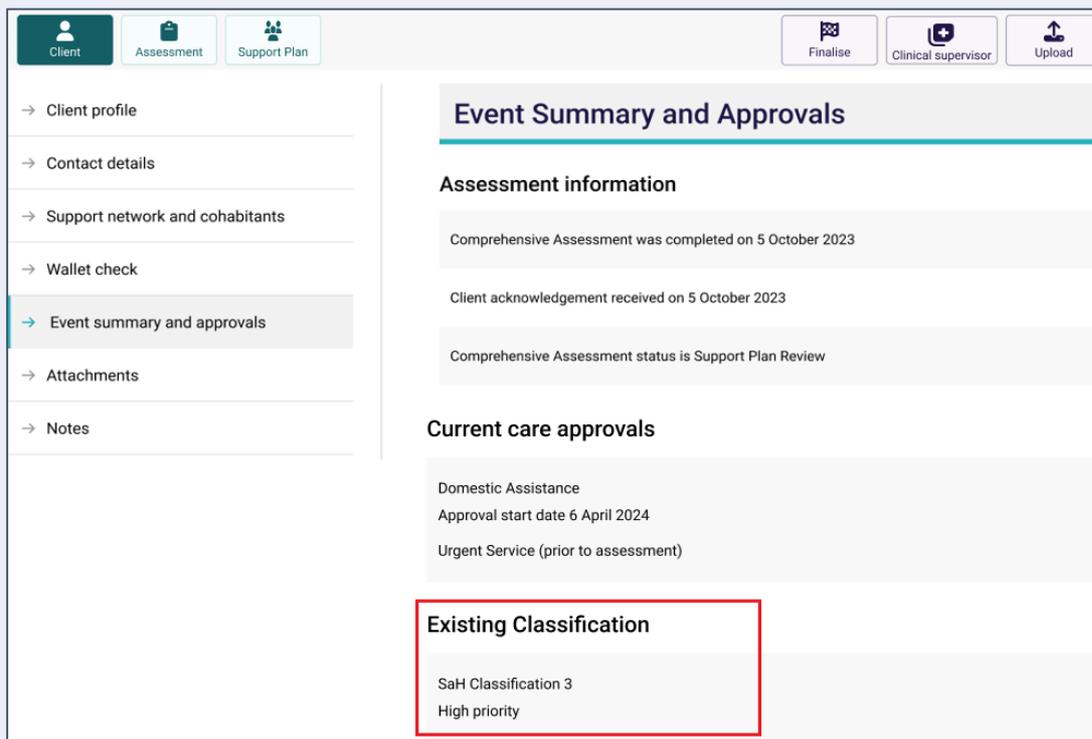
8.3 Wallet Check

The **Wallet check** page displays the status of the wallet check. This process is explained in the [Completing Identity Verification](#) section.



8.4 Event Summary and Approvals

The Event Summary and Approvals page displays information about screening and previous assessments (if applicable). It will also contain information about a client's current Approvals, services in place, existing classification and the priority, if applicable.



! Transitioned Home Care Package Levels

From 1 November 2025, All clients with approved Home Care Packages prior to 1 November 2025 will be transitioned to Support At Home services. This means that:

In the **Existing Classification** section of the **Event Summary and Approvals** page, there will be no Home Care Package displayed. The approval will display as **Transitioned HCP Level X** instead.

Home Care Packages will still be displayed under the heading **Past Packages**.

Winifred Witt's Details

> About

> Event Summary and Approvals

> Refer for Assessment

Existing Classification

Transitioned Home Care Pathway Transitioned HCP Level 4	Ongoing	Standard priority
--	---------	-------------------

! Short Term Restorative Care, Restorative Care Pathway and other transitioned classifications

For clients that have an STRC approval and have commenced services prior to 1 November 2025, STRC approvals and service delivery information will continue to be displayed in the App as per current functionality on the Event Summary screen and approvals screen.

For clients that have an STRC approval, and have either commenced service between 1 November 2025 and 23 February 2026, or has not commenced service by 23 February 2026:

- a) Their STRC approval and service delivery information will continue to be displayed in the App on the Event Summary screen and approvals screen.
- b) They will be eligible to transition to the following classifications after a reassessment:
 - Support at Home ongoing
 - End of Life pathway
 - Restorative Care Pathway
 - A different Assistive Technology/Home Modification tier.
- c) They will be eligible to transition to the following classifications after a Support Plan Review:
 - Second unit of Restorative Care Pathway
 - End of Life pathway
 - A different Assistive Technology/Home Modification tier.

On this page, for Support at Home services, assessors can view **all active existing classifications**, including multiple active classifications within the same category (e.g., multiple Assistive technology or Home modifications entries). They can view the priority level for each classification and service. They can also view approval start and end dates.

This ensures assessors have access to the most up-to-date and complete information about the client's approved services and priority categories, supporting accurate and informed care planning.

Event summary and Approvals

All fields marked with an asterisk (*) are required

Self-care products	Low priority
Managing body functions	Low priority

Existing Classification

Assistive technology AT Low	Short-term	
Support at Home SaH Classification 2	Ongoing	Standard priority
Home modifications HM Low	Short-term	

Current care approvals

Assistive technology

Assistive technology prescription and clinical support	Approval start date 2 June 2025	Approval end date 25 August 2026
Communication and information management products	Approval start date 2 June 2025	Approval end date 25 August 2026

Assessors can view a client's Assistive technology (AT) and Home modifications (HM) classification and priority category details after an assessment has been completed and approved. If the client has been recommended for AT or HM services, their classification and associated priority category will be displayed under the Existing Classification section, supporting informed decision-making for Support at Home aged care services.

Event Summary and Approvals

Existing Classification

Support at Home SaH Classification 5	Ongoing	High Priority
Support at Home SaH Classification 8	Pending allocation	Ongoing High Priority
Assistive technology AT Low	Short-term	High Priority
Home modifications HM Medium	Short-term	High Priority

8.5 Attachments

The **Attachments** page enables you to view client attachments and add attachments. This includes Notice of Decision letters (approval letters and non-approval letters).

1. To view an attachment, select the hyperlink name of the attachment name. A new page opens, and the attachment will be visible.

Harry Goff

Client Assessment Support Plan

Complete Triage Upload More options

Attachments

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

Add an attachment You can add attachments up to 5 MB

Assessment Attachments - 0 Files

State	Attachment name	Expiry

Other Attachments - 1 Files

State	Attachment name	Expiry
Local	My Aged Care - Consent Form - - Harry Goff 20240508	Other 169KB

2. Selecting **Add an attachment** will open a new page where you can record the name, type and description of the attachment. The **Types** of attachments that can be added match those available in the My Aged Care assessor portal.

! Comprehensive and Home Support assessors can attach the following attachment types:

- Approval letter sent to client
- Non-approval letter sent to client.

Other attachment types available include:

- Assessments - Allied Health Assessment, Assessment Tool, Prior Assessment
- Application Form
- AT (Assistive technology) prescription and quote
- Clinical Notes
- Delegate Nomination Form and Delegate Nomination Support
- Discharge Summary
- End-of-Life Form and other [documentation]
- HM (Home modifications) prescription and quote
- Inbound referral information
- Letters - Ineligible for Assessment, by Medical Practitioner
- Legal documentation
- Medication Summary
- Offline Approval Form, offline Notes
- Other
- Plans: Care Plan, Action Plan – External, Occupational Therapy Plan, Prior Support Plan, Support Plan – External
- Relevant Medical Summary
- Sensitive Attachment, sensitive client status
- Specific Service Requirements
- Wound Care Plan.

An Non-approval letter attachment type example is shown below. Select **Done** after choosing the attachment type. Once you have recorded the details, you can select **Capture photo**, which will open your device's camera app.

Add attachment

* Name
[Text Field] 0 of 146

* Type
Non-Approval Letter to Client

Description
[Text Area]

Capture photo

Done

Legal documentation
Letter by Medical Pract.
Medication Summary
Non-Approval Letter to Client
Occupational Therapy Plan
Offline Approval Form
Offline Notes

3. Once you have taken the photo, you will be given the option to either **Retake** or **Use Photo**. If you are happy with the attachment, select **Save to record**.

! When uploading an attachment, it is crucial to ensure that the document is intended for the correct client. Uploading an attachment to the wrong client's file can lead to a breach of privacy. Always double-check the client details before proceeding with the upload.

If you are uncertain about the client's identity, please refrain from uploading the document and seek clarification. This precautionary measure helps maintain the integrity of our service and protects client privacy.

4. The attachment will display in the Attachments page, under the appropriate section (such as 'Assessment Attachments').

Any attachments added whilst offline will also appear in the **Attachments** tab of the client record when the assessment is uploaded to the My Aged Care assessor portal.

Client: Flynn Errol

Winfieldi Trantow

Client | Assessment | Support Plan

Complete Triage | Upload | Quick notes | More options

Client Profile

Contact Details

Support Network and Cohabitants

Wallet check

Event summary and Approvals

Attachments

Notes

Attachments

All fields marked with an asterisk (*) are required

Add an attachment You can add attachments up to 5 MB

Assessment Attachments - 1 Files

State	Attachment name	Expiry	Type
Local	Errol Flynn non approval letter	-	Non-Approval Letter to Client

Other Attachments - 0 Files

State	Attachment name	Expiry	Type
-------	-----------------	--------	------

Correspondence Attachments - 0 Files

State	Attachment name	Expiry	Type
-------	-----------------	--------	------

! The attachment image will only save in the App. For security purposes, the image will not be saved locally to the device.

You will need to enter a **Name** and a **Type** of image (for example, Power of Attorney), which will be displayed in the My Aged Care assessor portal. You can also add a description for the attachment in a free text box.

8.6 Notes

The **Notes** page enables you to add and view Client notes. The Note types available match those available in the My Aged Care assessor portal:

- Observations
- Gender Identity/Sexual Preference
- History of Experiences
- Cultural/Religious
- Other
- Preference
- Sensitive Notes
- Client Story.

To add a Note:

1. Select **Notes** from the client record, and select **Add A Note**.



2. Select the most appropriate Note type from the drop down menu.

Add an end date for the note if applicable. Once added you are able to edit or delete it using the Calendar or the Eraser icons.

Enter a description for the note.

Finally, select **Save**.

3. These notes will be visible in the Notes tab on the client record when the assessment is uploaded to the My Aged Care assessor portal. Clients (and their support network) will only be able to view Client story and other notes.

! When needs assessors add a sensitive note about a client, all service providers who are sent a referral will see a flag informing them that there is a sensitive note about the client and instruct them to call the My Aged Care contact centre or the Needs assessor for more information.

9. Registering a support person

! *The Aged Care Act (2024)* is in force from 1 November 2025. The supporter role and the supporter guardian role in the new Act replaces the existing regular representative and authorised representative relationships in My Aged Care.

On 1 November 2025, representative relationships that are active in My Aged Care, and have not opted out, will transition to supporter relationships.

You can view pending and active support people, people that the client supports and other relationships on the **Support Networks and Cohabitant** page.

You can:

- [create a relationship for an individual supporter or supporter lite](#)
- [create a relationship for a supporter organisation](#)
- [create a relationship for a carer or other types of support people](#)
- [create a relationship in offline mode](#)
- [activate a pending relationship](#)
- [remove a support relationship.](#)

For more information on the types of support relationships that can be created, refer to [My Aged Care – Assessor Portal User Guide 2 – Registering support people and adding relationships.](#)

! A warning symbol will be displayed next to the **Support Network and Cohabitants** menu item when a client has pending supporters that need to be confirmed.

9.1 Creating a relationship for an individual supporter or supporter lite

! From 1 November 2025, relationships with individual agents cannot be created.

You must be connected to the Internet.

! If you are offline, you can create a local record in Offline mode and register the record when you go back Online. Go to [Creating a relationship in offline mode](#) to complete this process.

1. On the client's **Support Network and Cohabitants** page, select **Create Relationship**.

The screenshot shows the 'Support Network and Cohabitants' page for client Mary Contry. The page has a sidebar on the left with navigation options: Client Profile, Contact Details, Support Network and Cohabitants (selected), Wallet check, Event summary and Approvals, Attachments, and Notes. The main content area is titled 'Support Network and Cohabitants' and includes a 'Refresh relationships' button, a 'Last updated' timestamp of 11:18 am 26/09/2025, and a 'Create Relationship' button highlighted with a red box. Below these are sections for 'Supporters', 'Supporter Organisations', and 'Agent Organisations', all showing 'No relationships found'. A note at the top right states 'All fields marked with an asterisk (*) are required'.

2. In the **Create Relationship** page, choose a relationship to establish for the client. In this case it would be **Supporter**.

Depending on the relationship chosen, the following steps may vary.

The screenshot shows the 'Create Relationship' page for client Mary Contry. The page has a sidebar on the left with navigation options: Client Profile, Contact Details, Support Network and Cohabitants, Wallet check, Event summary and Approvals, Attachments, and Notes. The main content area is titled 'Create Relationship' and includes a dropdown menu for 'The support relationship Mary would like to establish is:' set to 'Supporter'. Below this is a question 'Would you like to appoint a Person or an Organisation?' with an empty input field. A 'Next' button is visible. A 'Done' button is at the bottom right. A red box highlights the 'Supporter' option in a list at the bottom.

3. For **Would you like to appoint a person or an organisation?**, choose **Person: someone who is not part of a support organisation e.g. A family member**, then select **Next**.



< Mary Contrary

Mary Contrary

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

Create Relationship

* The support relationship Mary would like to establish is:

Supporter

Would you like to appoint a Person or an Organisation? *

Next

Done

Person: Someone who is not part of a support organisation (e.g. a family member)
 Organisation: Staff at a support organisation (e.g. an advocacy organisation)

4. Select **Yes** or **No** to the question **Is this person present (in person or by phone/video call) with the client?**, then select **Next**.

If **No**, you will also be asked whether the client has a complete [Appointment of a Support Person Form](#) or Appointment of a Support Organisation Form with them.

< Mary Contrary

Mary Contrary

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

Create Relationship

* The support relationship Mary would like to establish is:

Supporter

Would you like to appoint a Person or an Organisation? *

Person: Someone who is not part of a support organisation (e.g. a family m...

Is this person present (in person or by phone/video call) with the client? *

Yes No

Does the client have a completed Appointment of support person or organisation form with them? *

Yes No

Next

! If the supporter is not present with the client, and they do not have a completed [Appointment of a Support Person Form](#) then the relationship cannot be created.

< Mary Contrary

Mary Contrary

All fields marked with an asterisk (*) are rec

Create Relationship

* The support relationship Mary would like to establish is:

Supporter

Would you like to appoint a Person or an Organisation? *

Person: Someone who is not part of a support organisation (e.g. a family m...

Is this person present (in person or by phone/video call) with the client? *

Yes

No

Does the client have a completed Appointment of support person or organisation form with them? *

Yes

No

! Unable to create this relationship if Support person is not present with client and Appointment of support person or organisation form not completed.

Next

5. After answering the above questions satisfactorily, the **Find a Support Person** page appears.

Enter the last name and first name of your supporter, and select **Search**. This is to ensure that there are no duplicate record being accidentally made in the My Aged Care system.

Then, go to the next step (**Step 6**) if there are no records found, or go to **Step 6B** if there are matching record/s.

Find a support person

Before registering a new client, check the client exists

First name	Last name	Aged Care ID
		AC- eg. 12345678

> Advanced search

Search

6. If there are no records found, you can continue to register this supporter in the My Aged Care system, by selecting **Create Supporter Relationship**.



Find a support person

Before registering a new client, check the client exists

First name: Ronald (6 of 50)

Last name: Weasley (7 of 50)

Aged Care ID: AC- eg. 12345678 (0 of 8)

Advanced search

Search

No records returned

Create Supporter Relationship

There are five pages in the **Register a Supporter** section: **Personal Details, Address Details, Identity Match, Attachments, and Details and Consent**. Enter all mandatory fields in each of the five pages until the Register button turns blue. Then, select **Register**.

Refer to steps 7 to 9 for more information on the Attachments page and the Details and Consent page.

Register a Supporter

All fields marked with an asterisk (*) are required

Personal details

Address details

Identity Match

Attachments

Details and Consent

Title

* First name: Ronald (6 of 50)

Middle name: (0 of 50)

* Last name: Weasley (7 of 50)

* Gender: Male

Date of birth / estimated age*

Please enter the date of birth. If not known, enter the client's estimated age.

Date of Birth Estimated Age

* Date of birth: 01/05/1970

Register

6B. If matching records are found, be sure to select the correct matching record.

Search results

Results 1 found - search again, select an existing client or register a new client. [Register new client](#)

Thomas Tank Active

1 RAILWAY Parade, BASSENDEAN, WA 6054

Aged Care ID AC04051199

Phone

The Support Person's details page appears. Double check that it is correct, then select **Attachments**.

Thomas Tank's Details

→ About

→ **Attachments**

→ Details and Consent

Personal Information

Born 2nd February 1945, Caucasian, born in England, married (registered/de facto), lives with partner

Preference for First Nations Assessment Organisation to do their assessment: Not specified

Communication requirements

No communication requirements provided

Identity documents (ID)

Medicare Card Number:

Department of Veterans' Affairs (DVA) Card Number:

Centrelink Customer Reference Number (CRN):

Aged Care Management Payment System (ACMPS) Number:

System for the Payment of Aged Residential Care (SPARC) Number:

Aged Care ID: AC04051199

Identity status

Not Attempted

Health Insurance

Create relationship

7. The **Attachments** page appears. Add the appointment of support person form by selecting **Add an image**.



Thomas Tank's Details

→ About

→ Attachments

→ Details and Consent

Add Appointment of support person or organisation form

Add an image You can add attachments up to 5MB

Current Attachments

Attachment Name	State	Expiry	Type	Size

Name the image.

The pre-selected Type is 'Appointment of Support Form.' Select **Done**, and the Type text box will be filled.

Then, select **Capture photo** to take a picture of the form.

Add attachment

* Name
Appointment form 16 of 146

* Type

Description

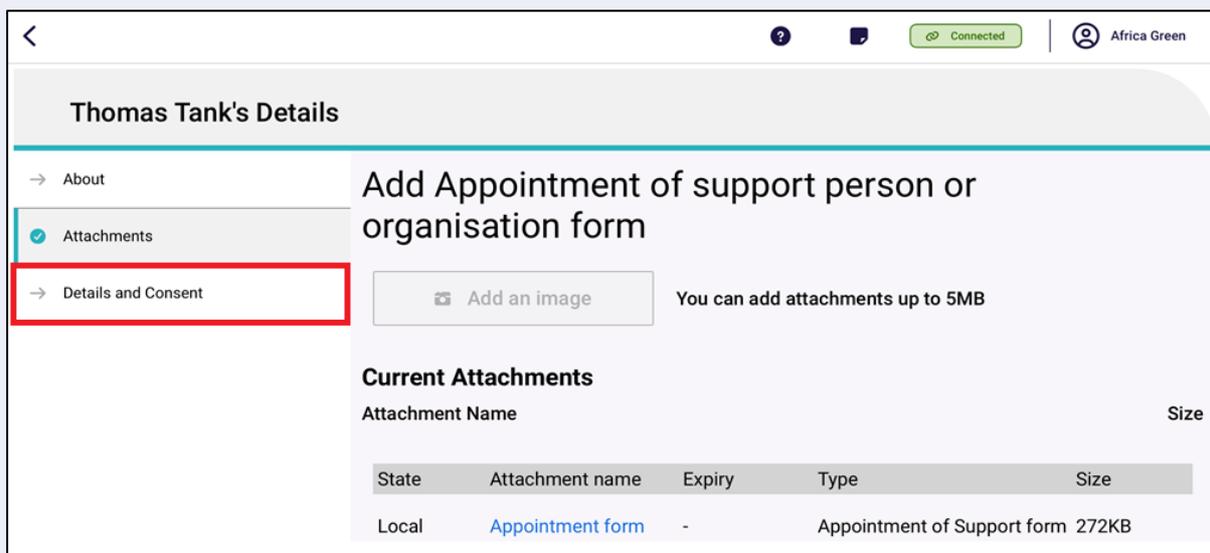
Capture photo

Done

Appointment of Support form

Finally, the Form appears in the **Current Attachments** section.

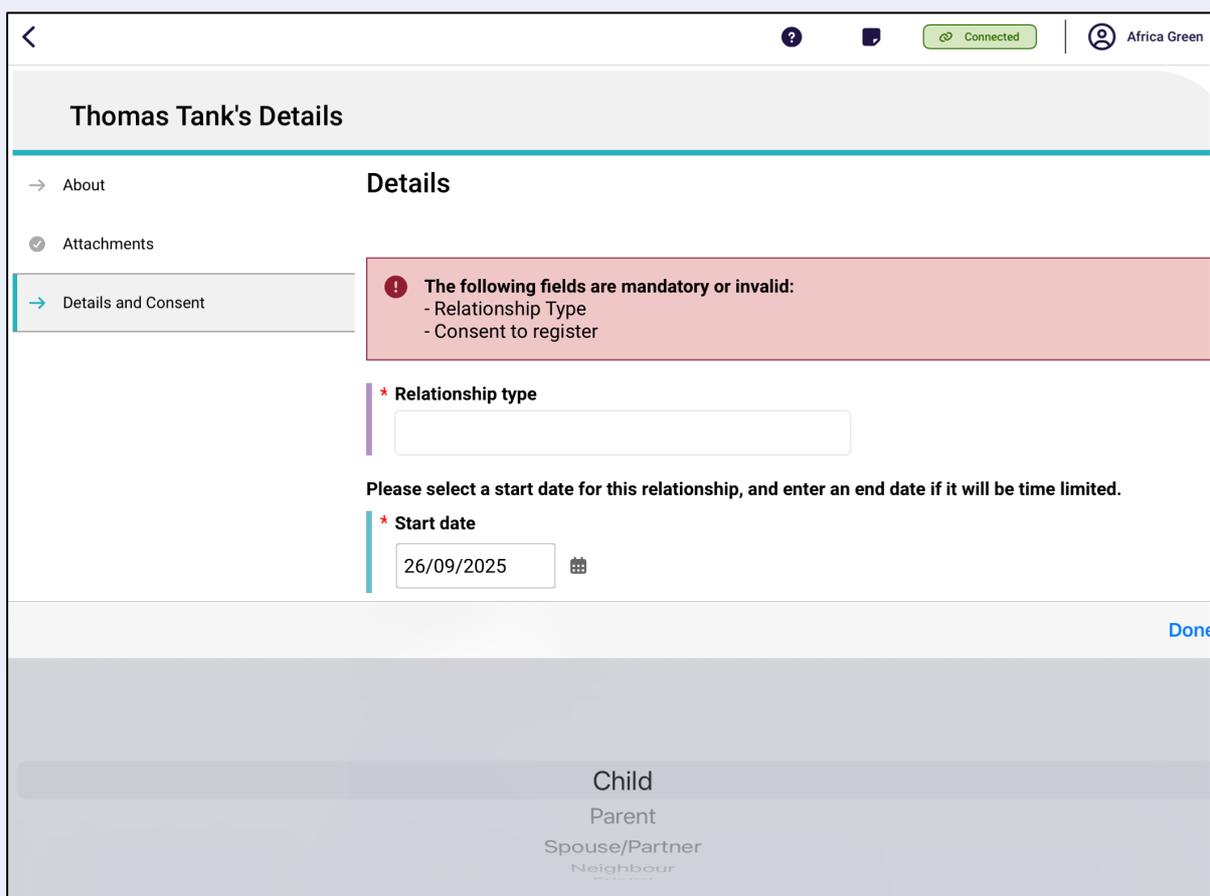
Next, go to **Details and Consent**.



8. The **Details and Consent** page appears.

Complete all mandatory fields in the Details section, including **Relationship type** (Child, Parent, Spouse/Partner, Neighbour, Friend or Other) and **start date** of relationship.

Error messages will continue to display until all mandatory fields are completed correctly.



Toggle **Yes** or **No** in the **Client Consent** and **Supporter Consent** sections.

As every response is defaulted to No initially, there will be error messages about not being able to submit the relationship request. As soon as appropriate responses are entered, these error messages will disappear.



Towards the bottom of the consent toggles, there are links to view the **duties of a supporter**, and the **terms and conditions of registering**.

Scroll down to the **Support Consent** section, and toggle **Yes** or **No** to **Has this support person consented to register**

If **Yes** is selected, then toggle **Yes** or **No** to **Does this support person have a conflict of interest?**

Finally, the supporter can also view the **duties of a supporter** and the **terms and conditions of registering** by selecting their corresponding Information buttons.

Then, select **Create Relationship**.



Thomas Tank's Details

→ About

● Attachments

● Details and Consent

Supporter consent

Has this support person consented to register?

I consent to being registered as a supporter under the *Aged Care Act 2024* for the client named in this form. I understand that I may request, access and receive information and documents, and communicate information, in line with the client's will and preferences, to support them to do a thing under, or for the purposes of, the *Aged Care Act 2024* (other than for the purposes of means testing). I consent to the Department disclosing my name, contact details, role and status (current, suspended or cancelled) as a supporter to the client and any other supporters that are registered for the client I understand that the Australian Privacy Principles may not apply to the client or another supporter if they receive any information or document containing my personal information. I acknowledge that as a supporter, I must comply with the duties imposed on me by the *Aged Care Act 2024*, including to respect the client's right to privacy and to have their personal information protected. If my circumstances change in a way that affects my ability or capacity to act as a supporter, I will contact My Aged Care.

Yes No

I declare that:

- I am voluntarily registering as a supporter.
- The information I provide to My Aged Care is accurate, complete and correct.

I understand and have read:

- The duties of a supporter.
- Terms and conditions of registering in My Aged Care.

View duties of a supporter

View terms and conditions of registering

Create relationship

! You must obtain the following consent before you can set up an active supporter relationship:

- supporter's consent to register with My Aged Care (this will create a Supporter record)
- supporter's consent to support the client
- client's consent to be supported by the nominated supporter.

Please note, consent is not required for Supporter Guardian relationships.

! A pending relationship is created if:

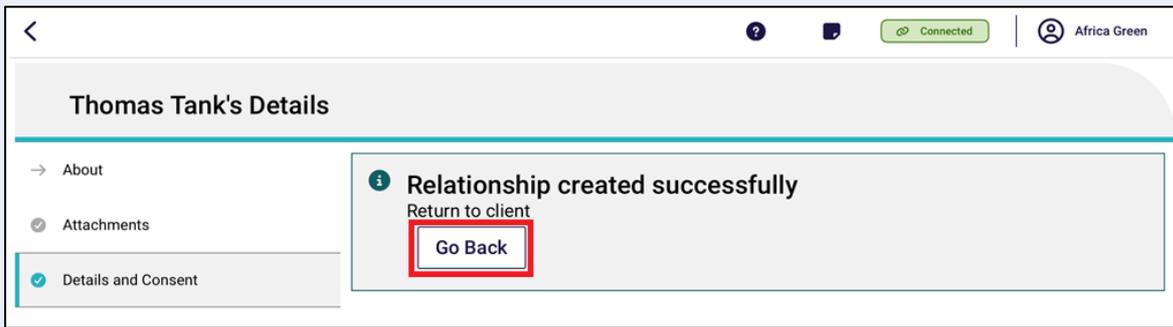
- either the client or supporter do not provide their consent for the relationship to be set up (applicable for individual supporters only)
- the start date of the relationship is in the future
- a Supporter guardian relationship is being created.

To activate a pending relationship, go to [Activating a pending relationship](#).

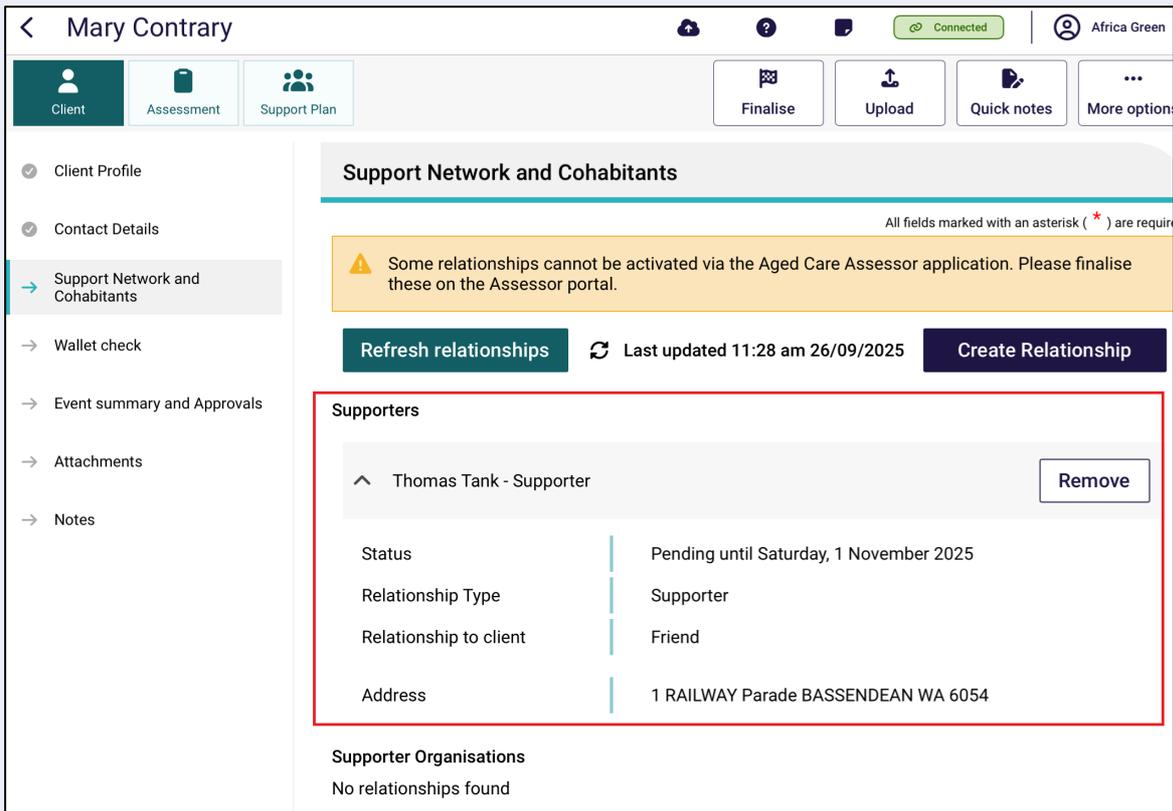
! If a supporter declares a conflict of interest in being registered in a support relationship, you will not be able to submit this support relationship request via the App. To discuss this further, please call the My Aged Care contact centre.

9. An information banner displays. Select **Go Back**, then the new supporter relationship will be displayed as an expandable banner on the **Support Network and Cohabitants** page.

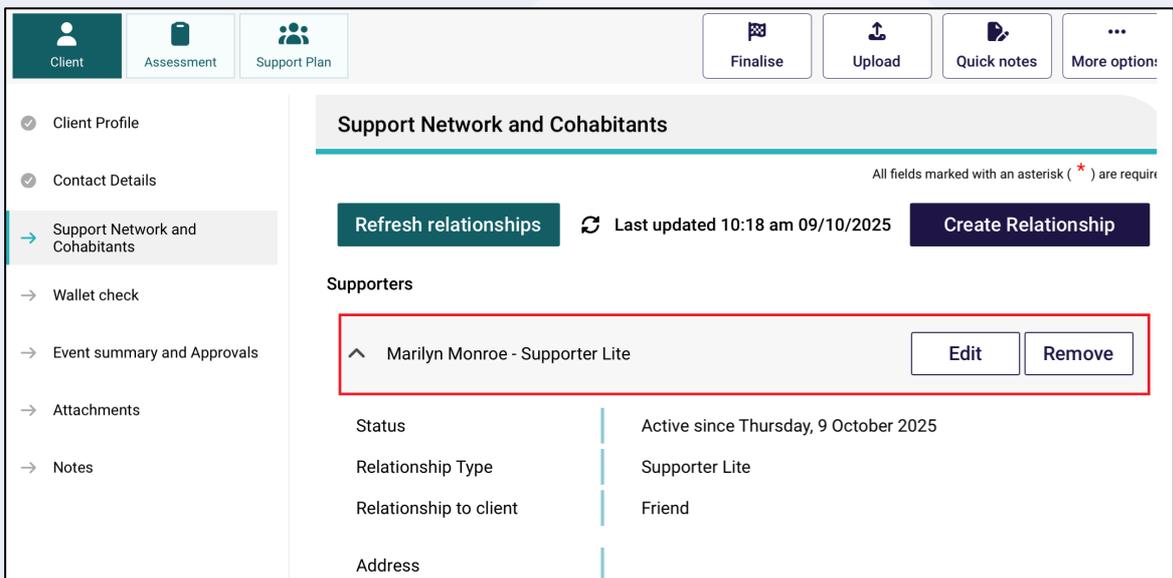




The below image shows a Pending Supporter relationship who is a friend of the client.



The below image shows an Active **Supporter Lite** relationship.



A Supporter Lite relationship is a type of Supporter relationship where the client did not consent to any information or document that may or must be given to the client under the Act to also be given to their supporter.

There will be an information message confirming that you will be setting up a Supporter Lite relationship.

The screenshot shows a 'Client Consent' form. On the left is a navigation menu with 'About', 'Attachments', and 'Details and Consent' (selected). The main content area has a title 'Client Consent*' and a question: 'Has Thomas Tank consented to Marilyn Monroe registering as their Supporter and accessing their information in My Aged Care in order to act on their behalf?'. Below this is a consent statement: 'I consent to registering the person named in this form as my supporter under the Aged Care Act 2024. I understand that my supporter may request, access and receive information and documents, and communicate information, in line with my will and preferences, to support me to do a thing under, or for the purposes of, the Aged Care Act 2024 (other than for the purposes of means testing). I consent to the Department collecting my personal information from my supporter and using it for aged care purposes. I understand that the Australian Privacy Principles may not apply to my supporter if they receive any information or document, provided to them in their capacity as my supporter.' There are two 'Yes/No' buttons. The second question is: 'I consent to any information or document that may or must be given to me under the Aged Care Act 2024 to also be given to my supporter. I understand this will include historical information and documents that exist on my client record in My Aged Care.' It also has 'Yes/No' buttons. A red box highlights the second question and its buttons. Below that is an information icon and a note: 'You have chosen not to consent to sharing certain information with your prospective supporter. This means that if your prospective supporter agrees to this registration, they will be registered as your supporter under the Aged Care Act 2024 but will not be given automatic access to information that may or must be provided to you under the Act. While they will be a supporter under the Act, they will be recorded as a 'supporter lite' to reflect your choice. You can seek to end or change a registration at any time'. At the bottom left is a 'Create relationship' button.

9.2 Creating a relationship for a supporter guardian

You must be connected to the Internet.

! If you are offline, you can create a local record in Offline mode and register the record when you go back Online. Go to [Creating a relationship in offline mode](#) to complete this process.

1. On the client's **Support Network and Cohabitants** page, select **Create Relationship**.

The screenshot shows the 'Support Network and Cohabitants' page for a client named Billy Banter. The top navigation bar includes 'Client', 'History', and 'Support Plan'. The main content area has a title 'Support Network and Cohabitants' and a note: 'All fields marked with an asterisk (*) are required.' There are two buttons: 'Refresh relationships' and 'Create Relationship' (highlighted with a red box). Below these are sections for 'Supporters', 'Supporter Organisations', 'Agent Organisations', 'People that Billy Banter supports', and 'Other Relationships', each with the text 'No relationships found'. The left sidebar has a menu with 'Client Profile', 'Contact Details', 'Support Network and Cohabitants' (highlighted with a red box), 'Wallet check', 'Event summary and Approvals', 'Attachments', and 'Notes'. The top right shows 'Connected' status and 'Africa Green' user name.



2. In the **Create Relationship** page, choose a relationship to establish for the client. In this case it would be **Supporter Guardian**.

← Billy Banter

Billy Banter

All fields marked with an asterisk (*) are required

Create Relationship

* The support relationship Billy would like to establish is:

Supporter Guardian

Would you like to appoint a Person or an Organisation? *

Next

Done

Supporter
Supporter Guardian
Agent
Carer
Emergency Contact

3. For **Would you like to appoint a person or an organisation?**, choose **Person: someone who is not part of a support organisation e.g. A family member**, then select **Next**.

← Billy Banter

Billy Banter

All fields marked with an asterisk (*) are required

Create Relationship

* The support relationship Billy would like to establish is:

Supporter Guardian

Would you like to appoint a Person or an Organisation? *

Next

Done

Person: Someone who is not part of a support organisation (e.g. a family member)
Organisation: Staff at a support organisation (e.g. an advocacy organisation)

4. Select **Yes** or **No** to the question **Is this person present (in person or by phone/video call) with the client?**, then select **Next**.

If **No**, you will also be asked whether the client has a complete [Registration of a Supporter Form](#) with them.

< Billy Banter

Billy Banter

All fields marked with an asterisk (*) are required

Create Relationship

* The support relationship Billy would like to establish is:

Supporter Guardian

Would you like to appoint a Person or an Organisation? *

Person: Someone who is not part of a support organisation (e.g. a family m...

Is this person present (in person or by phone/video call) with the client? *

Yes No

Does the client have a completed Appointment of support person or organisation form with them? *

Yes No

Next

! If the supporter guardian is not present with the client, and they do not have a completed [Registration of a Supporter](#) then the relationship cannot be created.

< Billy Banter

Billy Banter

All fields marked with an asterisk (*) are required

Create Relationship

* The support relationship Billy would like to establish is:

Supporter Guardian

Would you like to appoint a Person or an Organisation? *

Person: Someone who is not part of a support organisation (e.g. a family m...

Is this person present (in person or by phone/video call) with the client? *

Yes No

Does the client have a completed Appointment of support person or organisation form with them? *

Yes No

Unable to create this relationship if Support person is not present with client and Appointment of support person or organisation form not completed.

Next



5. After answering the above questions satisfactorily, the **Find a Support Person** page appears.

Enter the last name and first name of your supporter, and select **Search**. This is to ensure that there are no duplicate records being accidentally made in the My Aged Care system.

Then, go to the next step (**Step 6**) if there are no records found, or go to **Step 6B** if there are matching records.

The screenshot shows the 'Find a support person' page. At the top, there is a navigation bar with a back arrow, a help icon, a 'Connected' status, and the user's name 'Africa Green'. Below the title, there is an information box that says 'Before registering a new client, check the client exists'. The search form has three columns: 'First name' with the value 'Hermione' (8 of 50 characters), 'Last name' with the value 'Granger' (7 of 50 characters), and 'Aged Care ID' with the value 'eg. 12345678' (0 of 8 characters). There is an 'Advanced search' link and a 'Search' button.

6. If there are no records found, you can continue to register this supporter in the My Aged Care system, by selecting **Create Supporter Relationship**.

The screenshot shows the 'Find a support person' page. At the top, there is a navigation bar with a back arrow, a help icon, a 'Connected' status, and the user's name 'Africa Green'. Below the title, there is an information box that says 'Before registering a new client, check the client exists'. The search form has three columns: 'First name' with the value 'Ronald' (6 of 50 characters), 'Last name' with the value 'Weasley' (7 of 50 characters), and 'Aged Care ID' with the value 'eg. 12345678' (0 of 8 characters). There is an 'Advanced search' link and a 'Search' button. Below the search form, there is a message 'No records returned' and a 'Create Supporter Relationship' button, which is highlighted with a red border.

There are five pages in the **Register a Supporter** section: **Personal Details**, **Address Details**, **Identity Match**, **Attachments**, and **Details and Consent**. Enter all mandatory fields in each of the five pages until the Register button turns blue. Then, select **Register**.

Refer to steps 7 to 9 for more information on the Attachments page and the Details and Consent page.

< Back

Register a Supporter

All fields marked with an asterisk (*) are required

- Personal details
- Address details
- Identity Match
- Attachments
- Details and Consent

Title

*** First name**
Ronald 6 of 50

Middle name
0 of 50

*** Last name**
Weasley 7 of 50

*** Gender**
Male

Date of birth / estimated age*
Please enter the date of birth. If not known, enter the client's estimated age.

Date of Birth Estimated Age

*** Date of birth**
01/05/1970

Register

6B. If matching records are found, be sure to select the correct matching record.

< ? Connected Africa Green

Search results

If you can't find the Supporter person record, try other search parameters or [Create Supporter Relationship](#)

Results 1 found - search again, select an existing client or register a new client.

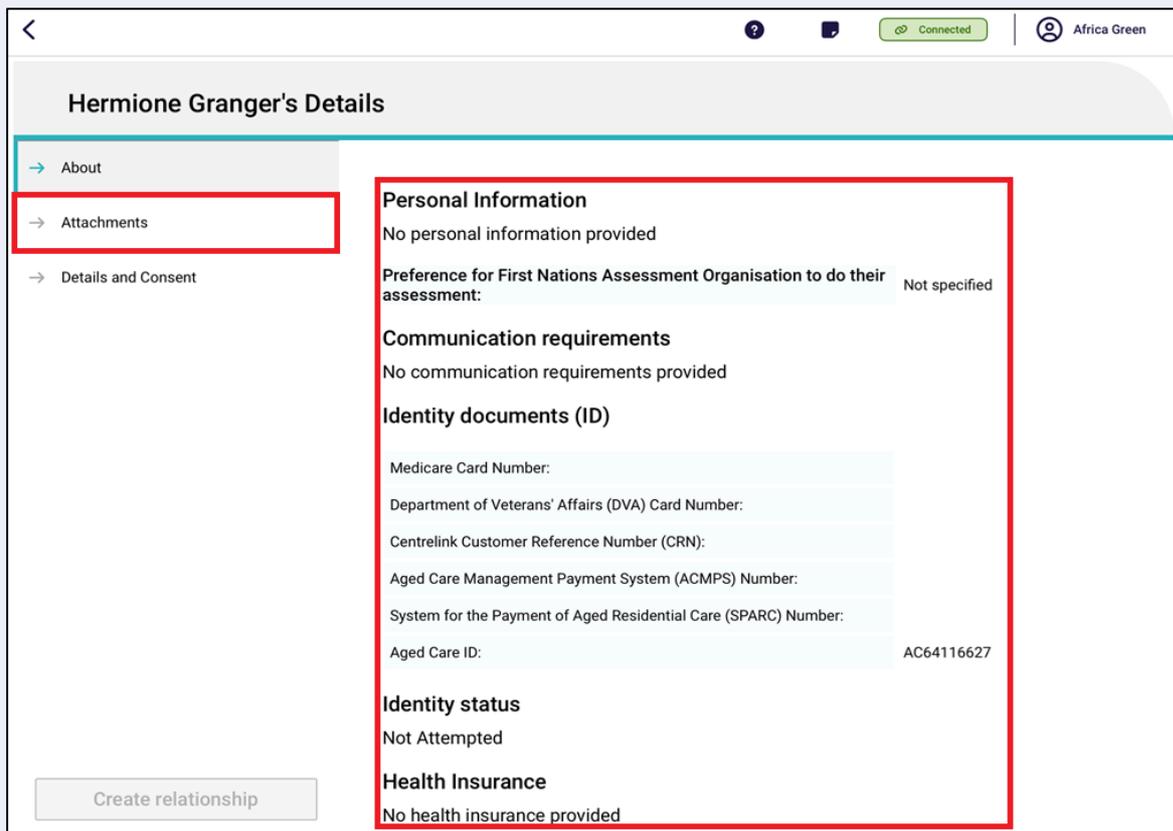
Hermione Granger Active

Aged Care ID AC64116627

Phone

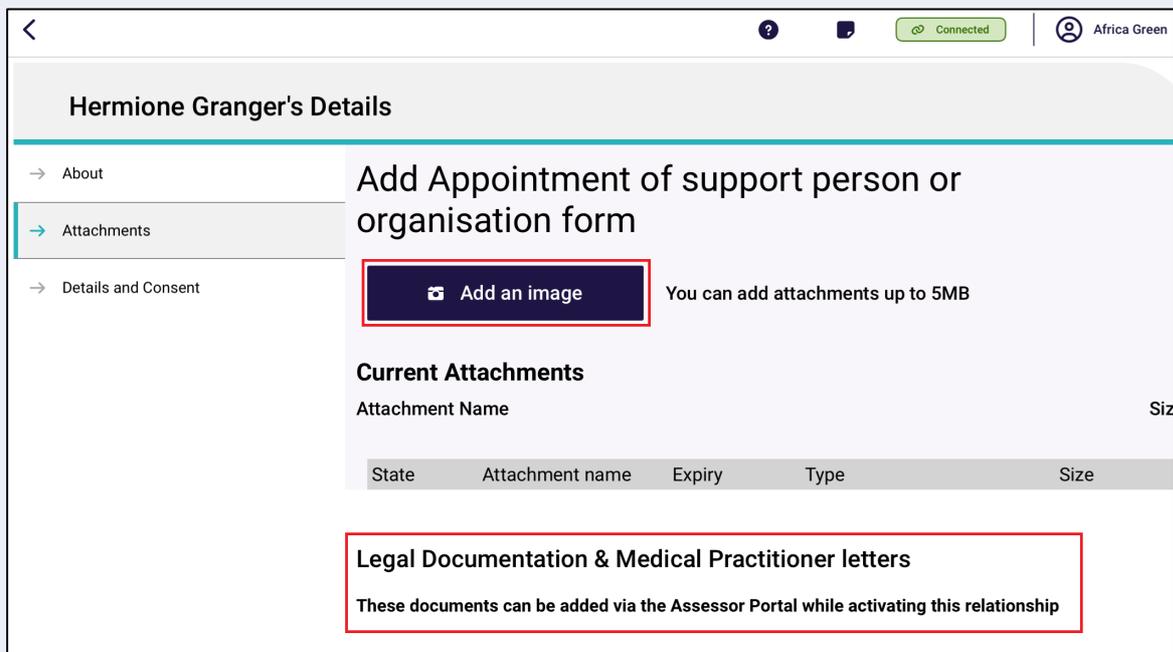
The Support Person's details page appears. Double check that it is correct, then select **Attachments**.





- The **Attachments** page appears. Add the appointment of support person form by selecting **Add an image**.

Supporter Guardian relationships require appropriate legal and/or medical documentation. These documents can be added via the Assessor Portal, after the relationship is created, [during the activation stage](#).



Name the image.

The pre-selected Type is 'Appointment of Support Form.' Select **Done**, and the Type text box will be filled.

Then, select **Capture photo** to take a picture of the form.

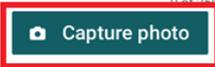


Add attachment

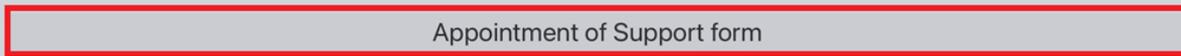
* Name
 16 of 146

* Type

Description







Finally, the Form appears in the **Current Attachments** section.

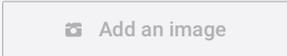
Next, go to **Details and Consent**.

< ?  Africa Green

Hermione Granger's Details

- About
- ✓ Attachments
- 

Add Appointment of support person or organisation form

 You can add attachments up to 5MB

Current Attachments

Attachment Name	State	Attachment name	Expiry	Type	Size
	Local	Appointment form	-	Appointment of Support form	290KB

Legal Documentation & Medical Practitioner letters

These documents can be added via the Assessor Portal while activating this relationship

8. The **Details and Consent** page appears.

There is a information banner reminding that Supporter Guardian relationships can only be created in Pending status.



Complete all mandatory fields in the Details section, including **Relationship type** (Child, Parent, Spouse/Partner, Neighbour, Friend or Other) and **start date** of relationship.

Error messages will continue to display until all mandatory fields are completed correctly.

The screenshot shows the 'Hermione Granger's Details' page in the Africa Green app. The 'Details' section is selected in the left-hand menu. A yellow warning banner states: 'Supporter Guardians can be only created as pending.' Below this, a red error message box says: 'The following fields are mandatory or invalid: - Relationship Type - Consent from relevant parties to establish support relationship'. The form fields are: 'Relationship type' (empty), 'Start date' (29/09/2025), and 'End date' (empty). A note above the date fields reads: 'Please select a start date for this relationship, and enter an end date if it will be time limited.'

Scroll down to the **Consent** section.

For supporter guardian relationships, the client's consent is not required, therefore only the **Supporter Guardian consent** section appear. Toggle **Yes** or **No** to **Has this support person consented to register?**

If **Yes** is selected, then toggle **Yes** or **No** to **Does this support person have a conflict of interest?** If there is a conflict of interest, enter the description at the text box that appears.

Finally, the supporter can also view the **duties of a supporter** and the **terms and conditions of registering** by selecting their corresponding Information buttons.

Then, select **Create Relationship**.

! Consent is not required for Supporter Guardian relationships.

! All Supporter Guardian relationships made in the app will be Pending.

To activate a pending relationship, go to [Activating a pending relationship](#).

! If a supporter declares a conflict of interest in being registered in a support relationship, you will not be able to submit this support relationship request via the App. To discuss this further, please call the My Aged Care contact centre.



← ? Connected Africa Green

Hermione Granger's Details

- About
- Attachments
- Details and Consent

Consent

Not required

Supporter Guardian consent

Has this support person consented to register?

I confirm that I am a legally appointed decision maker for the client named in this form. I understand that my legal authority for my appointment must be active when I am acting on behalf the client, and that I must act in line with the state or territory arrangements for that appointment, including within the scope of my decision-making authority. I consent to being registered as a supporter under the *Aged Care Act 2024* for the client. I understand that I may request, access and receive information and documents, and communicate information, in line with the client's will and preferences, to support them to do a thing under, or for the purposes of, the *Aged Care Act 2024* (other than for the purposes of means testing). I consent to the Department disclosing my name, contact details, role and status (current, suspended or cancelled) as a supporter to the client and any other supporters that are registered for the client. I understand that the Australian Privacy Principles may not apply to the client or another supporter if they receive any information or document containing my personal information. I acknowledge that as a supporter, I must comply with the duties imposed on me by the *Aged Care Act 2024*, including to respect the client's right to privacy and to have their personal information protected. If my circumstances change in a way that affects my ability or capacity to act as a supporter, I will contact My Aged Care.

Yes No

Does this support person have a conflict of interest?

If you have a conflict of interest (either real, potential or perceived) acting as a supporter for the client named in this form, please advise below. For more information regarding what a Conflict of Interest is please visit: [My Aged Care Website](#)

I have a conflict of interest (either real, potential or perceived) acting as a supporter for the client named in this form:

Yes No

* Conflict of interest description

Conflict of interest details go here

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I declare that:

- I am voluntarily registering as a supporter.
- The information I provide to My Aged Care is accurate, complete and correct.

I understand and have read:

- The duties of a supporter.
- Terms and conditions of registering in My Aged Care.

View duties of a supporter

View terms and conditions of registering

Create relationship

9. An information banner displays. Select **Go Back**, then the new supporter relationship will be displayed as an expandable banner on the **Support Network and Cohabitants** page.

← ? Connected Africa Green

Hermione Granger's Details

- About
- Attachments
- Details and Consent

Relationship created successfully

Return to client

Go Back

This example shows a Pending Supporter Guardian relationship who is a child of the client.



The screenshot shows the 'Support Network and Cohabitants' section of the Billy Banter app. At the top, there are navigation icons for Client, History, and Support Plan. Below this, a sidebar lists various client-related actions. The main content area displays the 'Support Network and Cohabitants' section for a client named Billy Banter. It includes a 'Refresh relationships' button, a 'Last updated' timestamp, and a 'Create Relationship' button. Below this, there is a list of supporters, with details for 'Hermione Granger - Supporter Guardian' shown in a table format.

Supporters	
^ Hermione Granger - Supporter Guardian	
Status	Pending until Saturday, 1 November 2025
Relationship Type	Supporter Guardian
Relationship to client	Child
Address	

9.3 Creating a relationship for a supporter organisation

This section describes four different supporter organisation relationship types that can be created:

- Supporter Organisation – Supporter
- Supporter Organisation – Supporter Lite
- Support Organisation – Supporter Name – Supporter
- Support Organisation – Supporter Name – Supporter Lite.

A (full) **Supporter Organisation – Supporter relationship** has:

- Client's consent to registering the supporter organisation as their supporter.
- Client's consent for any information given to them to be also given to their supporter organisation.
- The Supporter organisation consents to being registered as a supporter to the client, who may or may not have a conflict of interest.

A **Supporter Organisation – Supporter Lite relationship** has:

- Client's consent to registering the supporter organisation as their supporter.
- The Supporter organisation consents to being registered as a supporter to the client. The organisation may or may not have a conflict of interest.
- No client consent to share information with their support organisation.

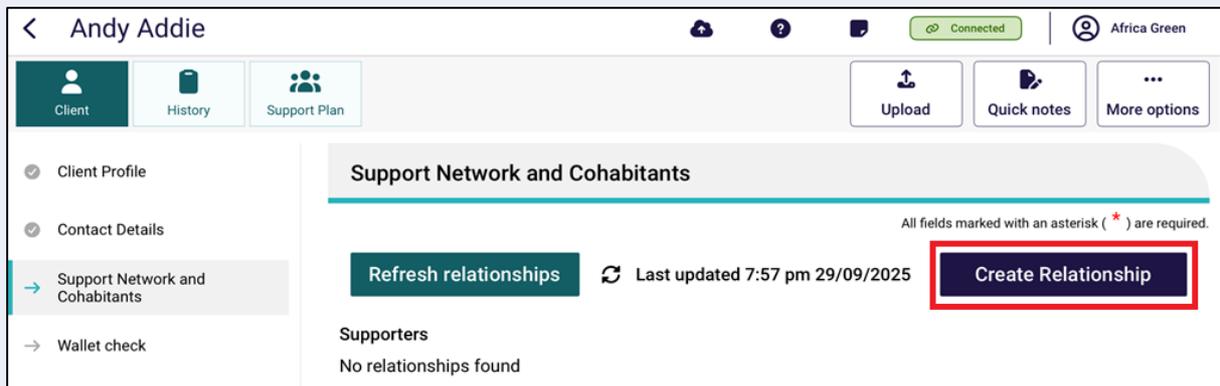
A **Supporter Organisation – Supporter Name – Supporter relationship** has:

- Client's consent to registering a particular supporter/staff member within the supporter organisation to be their supporter.
- Client's consent for any information given to them to be also given to their supporter/staff member (only).
- No direct relationship between the client and the supporter organisation.

A **Supporter Organisation – Supporter Name – Supporter Lite** relationship has:

- Client's consent to registering a particular supporter/staff member within the supporter organisation to be their supporter.
- No client consent to share information with their supporter/staff member.
- No direct relationship between the client and the supporter organisation.

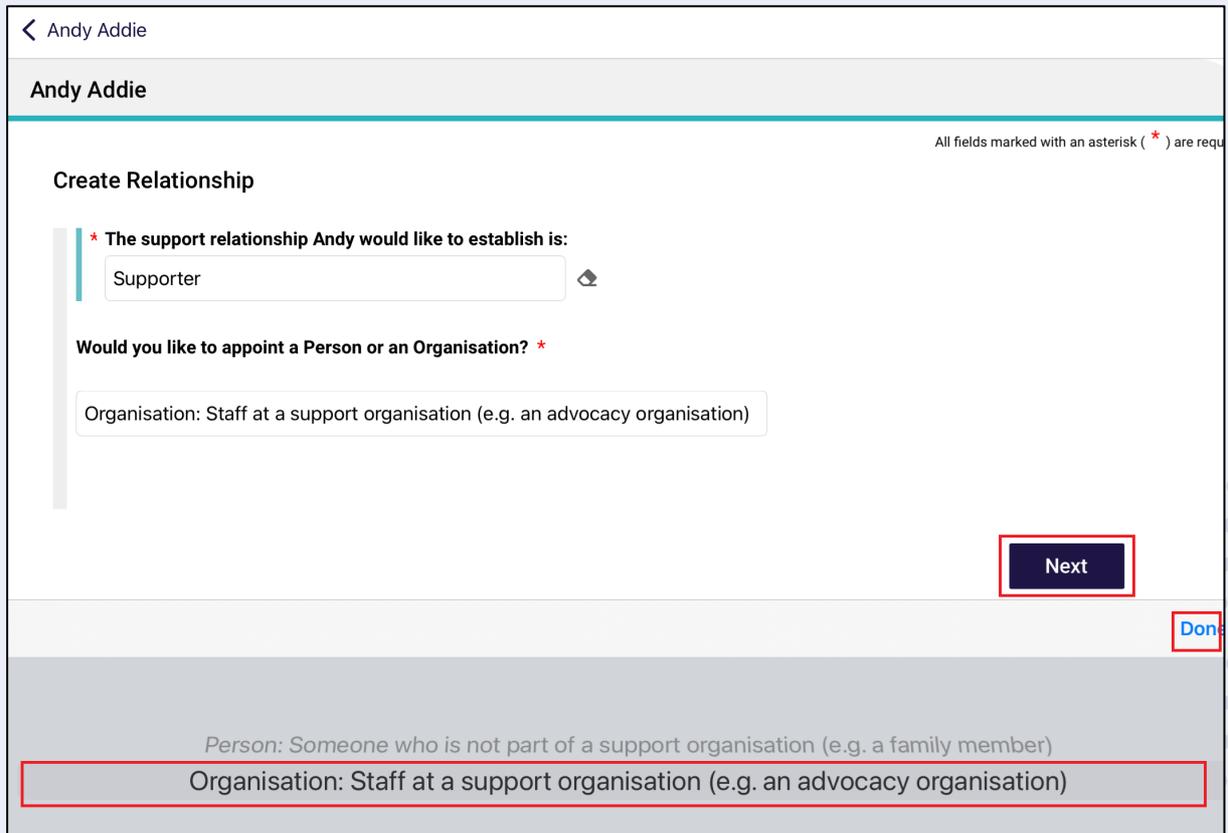
1. On the client's **Support Network and Cohabitants** page in Client Details, select **Create Relationship**.



2. In the **Create Relationship** page, choose a relationship to establish for the client. In this case it would be **Supporter**.

The next question **Would you like to appoint a person or an organisation?** appears. Choose **Organisation: staff at a support organisation (e.g., An advocacy organisation)**.

Then, select **Next**.



- Search for the supporter organisation by either entering their name, or postcode and/or distance away from the postcode, selecting the correct locality from the drop down menu that appears, then select **Search**.

In the Postcode section, you can also search by Suburb name.

<p>Postcode</p> <input type="text" value="Perth"/> <ul style="list-style-type: none"> PERTH WA 6000 PERTH TAS 7300 PERTH AIRPORT WA 6105 PERTHVILLE NSW 2795 	<p>Postcode</p> <input type="text" value="6000"/> <ul style="list-style-type: none"> PERTH WA 6000 CRAWLEY WA 6009 EAST PERTH WA 6004 HIGHGATE WA 6003
---	---

Search by Organisation Name Example

< Back

Add a Supporter Organisation

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

Search for Support Organisation by:

Organisation Name

Search

Organisation Name

Search by Distance and Postcode Example

< Back

Add a Supporter Organisation

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

Search for Support Organisation by:

Post Code

Organisation Name

Search

Postcode

Distance

Done

40km

60km

80km

100km

- Select the supporter organisation's card.



< Back

Add a Supporter Organisation

All fields marked with an asterisk (*) are required

2 matching results

Leamington Aged Care Pty Ltd		Access Community Services	
Branch:	Golden Grove Outlet	Branch:	Access Community Care
Location:	2 HIGH Street, SOUTHPORT, QLD 4215	Location:	95 7 WEMBLEY Road, LOGAN CENTRAL, QLD 4114
Phone number:	+6102654512545	Phone number:	+610255023668
Support offered:	Supporter	Support offered:	Supporter

5. The organisation details are displayed in the **About** section of the **Organisation Details** page. Double check that it is correct, then select **Attachments**.

< Back

Add a Supporter Organisation

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

Organisation details

- About
- ☑ Attachments
- Details and Consent

Organisation Name
Access Community Services

Branch
Access Community Care Finder - PHN South Brisbane

Phone number
+610255023668

Address
95 7 WEMBLEY Road,LOGAN CENTRAL,QLD 4114

Support offered
Supporter

6. The **Attachments** page appears. Add the appointment of support organisation form by selecting **Add an image** and taking an image of the form from your device. Name the image and its name will appear under **Current Attachments**. Then, continue to the **Details and Consent** page.

< Back

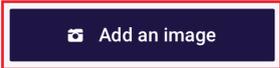
Add a Supporter Organisation

All fields marked with an asterisk (*) are required

Organisation details

- About
- ☑ Attachments
- Details and Consent

Add Appointment of support person or organisation form

 You can add attachments up to 5MB

Current Attachments

Attachment Name				Size
State	Attachment name	Expiry	Type	Size

7. The **Details and Consent** page appears.

Fill out all mandatory fields in the details section, including the **start date** of the relationship.

When this page first appear there will be an error message saying that there are mandatory fields to complete or invalid fields. This error message will continue to display until all mandatory fields are completed correctly.

All supporter workers of this organisation will be able to assist the client. However if the client only want to work with one particular person, enter their name in the **Full name of the support person** section.

The screenshot shows a web form titled "Add a Supporter Organisation". On the left is a navigation menu with "Details and Consent" selected. The main content area is titled "Details" and includes a red error banner stating "The following fields are mandatory or invalid: - Consent to register". Below this, there is a text instruction: "All support workers at the organisation will be able to assist the client. If the client only wants to work with one person that they already know, please enter their full name here". This is followed by a text input field for "Full name of the support person" with a "0 of 100" character count. Below that is a date selection section with the instruction "Please select a start date for this relationship, and enter an end date if it will be time limited." It contains a "Start date" field with a calendar icon and the value "29/09/2025", and an "End date" field which is currently empty and highlighted in red.

8. Scroll down to the **Client Consent** section.

There are two sections to the Client consent: the top section describes the consent to registering the supporter organisation as the client's supporter. The bottom section describes consent to share any information given to the client to be also given to the supporter organisation.

When this page first appears, both consent toggle defaults to **No**. This means that their corresponding information message or error message also displays. As soon as appropriate responses are entered, these messages will disappear.

Select **Yes** or **No** to both consent toggles.

The top client consent must be **Yes** for the supporter organisation relationship to be created.

The bottom client consent can be **Yes** or **No**. If No, then a Supporter Lite relationship will be created.

At the bottom of the client consent section, there are links to view the **duties of a supporter**, and the **terms and conditions of registering**.

← Back

Add a Supporter Organisation

All fields marked with an asterisk (*) are required

Organisation details

- About
- Attachments
- Details and Consent

Create Relationship

Client consent

I consent to registering the organisation/outlet named in this form as my supporter under the *Aged Care Act 2024*. I understand that my supporter may request, access and receive information and documents, and communicate information, in line with my will and preferences, to support me to do a thing under, or for the purposes of, the *Aged Care Act 2024* (other than for the purposes of means testing). I consent to the Department collecting my personal information from my supporter and using it for aged care purposes. I understand that the Australian Privacy Principles may not apply to my supporter if they receive any information or document, provided to them in their capacity as my supporter.

Yes No

! You cannot submit this Supporter Relationship request because Andy Addie has not given consent to registering as their supporter under, or for the purposes of, the *Aged Care Act 2024*. To discuss this further you can call My Aged Care Contact Centre on 1800 200 422 Monday to Friday between 8am and 8pm AEST.

I consent to any information or document that may or must be given to me under the *Aged Care Act 2024* to also be given to my supporter. I understand this will include historical information and documents that exist on my client record in My Aged Care.

Yes No

i You have chosen not to consent to sharing certain information with your prospective supporter. This means that if your prospective supporter agrees to this registration, they will be registered as your supporter under the *Aged Care Act 2024* but will not be given automatic access to information that may or must be provided to you under the Act. While they will be a supporter under the Act, they will be recorded as a 'supporter lite' to reflect your choice. You can seek to end or change a registration at any time

I declare that:

- I am voluntarily registering a supporter.
- The information I provide to My Aged Care is accurate, complete and correct.

I understand and have read:

- The duties of a supporter.
- Terms and conditions of registering in My Aged Care.

i View duties of a supporter ▶

i View terms and conditions of registering ▶

If a particular supporter was nominated, then the name of that supporter is displayed in the Consent declaration instead.

← Back

Add a Supporter Organisation

All fields marked with an asterisk (*) are required

Organisation details

- About
- Attachments
- Details and Consent

Client consent

I consent to registering Sarah Supporter at the organisation/outlet named in this form as my supporter under the *Aged Care Act 2024*. I understand that my supporter may request, access and receive information and documents, and communicate information, in line with my will and preferences, to support me to do a thing under, or for the purposes of, the *Aged Care Act 2024* (other than for the purposes of means testing). I consent to the Department collecting my personal information from my supporter and using it for aged care purposes. I understand that the Australian Privacy Principles may not apply to my supporter if they receive any information or document, provided to them in their capacity as my supporter.

Yes No

9. Scroll down to the **Supporter Consent** section.

Toggle **Yes** or **No** to that the supporter organisation consents to being a supporter for the client.

If **Yes** is selected, then toggle **Yes** or **No** to **Does this support person have a conflict of interest?** If there is a conflict of interest, enter the description at the text box that appears. Note that this question applies to both the supporter organisation and/or to the particular supporter inside the supporter organisation, depending on whether a particular support person was named.



Finally, the supporter can also view the **duties of a supporter** and the **terms and conditions of registering** by selecting their corresponding Information buttons.

Then, select **Create Relationship**.

< Back

Add a Supporter Organisation

All fields marked with an asterisk (*) are requi

Organisation details

- About
- Attachments
- **Details and Consent**

Supporter consent

Access Community Services / Access Community Care Finder - PHN South Brisbane consents to being registered as a supporter under the *Aged Care Act 2024* for the client named in this form. It understands that it may request, access and receive information and documents, and communicate information, in line with the client's will and preferences, to support them to do a thing under, or for the purposes of, the *Aged Care Act 2024* (other than for the purposes of means testing). Access Community Services / Access Community Care Finder - PHN South Brisbane consents to the Department disclosing its name, contact details, role and status (current, suspended or cancelled) as a supporter to the client and any other supporters that are registered for the client. Access Community Services / Access Community Care Finder - PHN South Brisbane understands that the Australian Privacy Principles may not apply to the client or another supporter if they receive any information or document containing its personal information. Access Community Services / Access Community Care Finder - PHN South Brisbane acknowledges that as a supporter, it must comply with the duties imposed on it by the *Aged Care Act 2024*, including to respect the client's right to privacy and to have their personal information protected. If the circumstances of Access Community Services / Access Community Care Finder - PHN South Brisbane change in a way that affects our ability or capacity to act as a supporter, it will contact My Aged Care.

Yes No

Does this support person have a conflict of interest?

If you have a conflict of interest (either real, potential or perceived) acting as a supporter for the client named in this form, please advise below. For more information regarding what a Conflict of Interest is please visit: [My Aged Care Website](#)

I have a conflict of interest (either real, potential or perceived) acting as a supporter for the client named in this form:

Yes No

*** Conflict of interest description**

Maximum 500 characters

0 of 500

Create Relationship

I declare that:

- Access Community Services is voluntarily registering as a supporter.
- The information we provide to My Aged Care is accurate, complete and correct

I understand and have read:

- The duties of a supporter.
- Terms and conditions of registering in My Aged Care.

View duties of a supporter

View terms and conditions of registering

10. The organisation relationship is created. Select **Go Back** to return to the client record.

< Andy Addie

Add a Supporter Organisation

All fields marked with an asterisk (*) are requi

Organisation details

- About
- Attachments
- **Details and Consent**

Relationship created successfully

Return to client

Go Back

11. Once on the client's record, the new organisation relationship will be visible. There are four possible types of outcomes:



- Supporter Organisation – Supporter
- Supporter Organisation – Supporter Lite
- Support Organisation – Supporter Name – Supporter
- Support Organisation – Supporter Name – Supporter Lite.

Supporter Organisation relationships appear underneath the **Supporter Organisations** heading as **[Supporter Organisation Name] – Supporter**. It is created in a Pending status, and able to be activated or removed by selecting the **Activate** and **Remove** buttons respectively.

The screenshot shows the 'Supporter Organisations' section for 'Andy Addie'. The interface includes a sidebar with navigation options like 'Client Profile', 'Contact Details', and 'Support Network and Cohabitants'. The main content area shows a 'Supporter Organisations' list with one entry: 'Access Community Services - Supporter'. This entry is highlighted with a red box and includes 'Activate' and 'Remove' buttons. Below the entry, details are listed: Status (Pending since Monday, 29 September 2025), Relationship Type (Supporter), Branch (Access Community Care Finder - PHN South Brisbane), and Address (95 7 WEMBLEY Road LOGAN CENTRAL QLD 4114). A 'Refresh relationships' button and 'Last updated 10:12 pm 29/09/2025' timestamp are also visible.

Support Organisation – Support Lite relationships are created in a Pending status and requires approval of a delegate to become Active. The relationship can be removed.

The screenshot shows the 'Supporter Organisations' section for 'Andy Addie'. The interface is similar to the previous screenshot. The main content area shows a 'Supporter Organisations' list with one entry: 'Access Community Services - Supporter Lite'. This entry is highlighted with a red box and includes a 'Remove' button. Above the entry, there is a yellow warning banner that reads 'Relationship Undergoing Delegate Approval'. Below the entry, details are listed: Status (Pending since Monday, 29 September 2025), Relationship Type (Supporter Lite), Branch (Access Community Care Finder - PHN South Brisbane), and Address (95 7 WEMBLEY Road LOGAN CENTRAL QLD 4114). A 'Refresh relationships' button and 'Last updated 10:08 pm 29/09/2025' timestamp are also visible.

Support Organisation – Supporter Name – Supporter relationships are created in a Pending status and requires activation in the Assessor Portal rather than this app. The relationship can be removed.

The screenshot shows the app interface for a client named 'Andy Addie'. The top navigation bar includes a back arrow, the client name, and a 'Connected' status. Below this is a menu with 'Client', 'History', and 'Support Plan' options, along with 'Upload', 'Quick notes', and 'More options' buttons. The main content area is titled 'Support Network and Cohabitants' and features a warning message: 'Some relationships cannot be activated via the Aged Care Assessor application. Please finalise these on the Assessor portal.' Below the warning are 'Refresh relationships' and 'Create Relationship' buttons. The 'Supporters' section shows 'No relationships found'. A red box highlights the 'Supporter Organisations' section, which lists one entry: 'Leamington Aged Care Pty Ltd - Sammy Supporter - Supporter'. The details for this entry are: Status: Pending since Monday, 29 September 2025; Relationship Type: Supporter; Branch: Golden Grove Outlet; Address: 2 HIGH Street SOUTHPORT QLD 4215. A 'Remove' button is visible next to the entry name.

Support Organisation – Supporter Name – Supporter Lite relationships are created in a Pending status and requires activation in the Assessor Portal rather than this app. The relationship can be removed.

The screenshot shows the app interface for a client named 'Andy Addie', similar to the first screenshot. The main content area is titled 'Support Network and Cohabitants' and features the same warning message. Below the warning are 'Refresh relationships' and 'Create Relationship' buttons. The 'Supporters' section shows 'No relationships found'. A red box highlights the 'Supporter Organisations' section, which lists one entry: 'Access Community Services - Sarah Supporter - Supporter Lite'. The details for this entry are: Status: Pending since Tuesday, 30 September 2025; Relationship Type: Supporter Lite; Branch: Access Community Care Finder - PHN South Brisbane; Address: 95 7 WEMBLEY Road LOGAN CENTRAL QLD 4114. A 'Remove' button is visible next to the entry name.



9.4 Creating a relationship for an agent organisation

1. On the client's **Support Network and Cohabitants** page in Client Details, select **Create Relationship**.

Client Profile

Contact Details

Support Network and Cohabitants

Support Network and Cohabitants

Refresh relationships

Last updated 2:24 pm 29/09/2025

Create Relationship

2. In the **Create Relationship** page, choose a relationship to establish for the client. In this case it would be **Agent**, then select **Next**.

! Individual agent relationships cannot be created in the Aged Care Assessor App, therefore when **Agent** is selected, it will be defaulted to **Agent Organisation**.

Create Relationship

* The support relationship Jules would like to establish is:

Agent

Next

Done

Supporter

Supporter Guardian

Agent

Carer

Emergency Contact

GP

3. Search for the agent organisation by either entering their name, or postcode and/or distance away from the postcode, then select **Search**.



Organisation Name example

< Back

Add an Agent Organisation

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

Search for Support Organisation by:

Post Code Organisation Name

Organisation Name

Search

Postcode and Distance example

< Back

Add an Agent Organisation

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

Search for Support Organisation by:

Post Code Organisation Name

Postcode **Distance**

MELBOURNE VIC 3000 60km

Done

10km
20km
40km
60km
80km
100km

4. Select the agent organisation's card.

< Back

Add an Agent Organisation

54 matching results

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

AUTO_ORG_igspldqq	AUTO_ORG_womvhasj	Council On The Ageing (Vic) Inc
Branch: SUPPORTOUTLET_vimh	Branch: SUPPORTOUTLET_ohnpj	Branch: COTA VIC care finder
Location: 35 COLLINS Street, MELBOURNE, VIC 3000	Location: 35 COLLINS Street, MELBOURNE, VIC 3000	Location: Suite 2.5/Upper Ground Floor 1/81, 4211 4 St. Kilda Road,
Phone number: +610742452889	Phone number: +610474522262	Phone number: +610267457621
Support offered: Agent (Indigenous facilitator)	Support offered: Agent (Indigenous facilitator)	Support offered: Agent (Care finder)



- The agent organisation's details display. Make sure the details are correct, then go to the **Attachments** page.

← Back

Add an Agent Organisation

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

Organisation details

- About
- ✓ Attachments
- Details and Consent

Organisation Name
Council On The Ageing (Vic) Inc

Branch
COTA VIC care finder SE Melb

Phone number
+610267457621

Address
Suite 2.5/Upper Ground Floor 1/81, 4211 4 St. Kilda Road, MELBOURNE, VIC 3004

Support offered
Agent (Care finder)

- The **Attachments** page appears. Add the appointment of support organisation form by selecting **Add an image** and taking an image of the form from your device. Name the image and its name will appear under **Current Attachments**. Then, continue to the **Details and Consent** page.

← Back

Add an Agent Organisation

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

Organisation details

- About
- ✓ Attachments
- Details and Consent

Add Appointment of support person or organisation form

Add an image You can add attachments up to 5MB

Current Attachments

Attachment Name	State	Attachment name	Expiry	Type	Size

- The **Details and Consent** page appears. Fill out all mandatory fields in the **Details** section, including type of support required, and the start date of relationship.

Error messages will continue to display until all mandatory fields are completed correctly.

For **Support Required**, select the listing from the drop down menu, then select **Done**. This will then display in the text box. These values come directly from the agent organisation chosen from Step 4 and therefore may have more than one value displayed.

All agents at the agent organisation will be able to assist the client. Optionally, you can nominate the full name of one agent, in the **Full name of the support person** section.

< Back

Add an Agent Organisation

All fields marked with an asterisk (*) are required

Organisation details

- About
- Attachments
- Details and Consent

Details

! The following fields are mandatory or invalid:
 - Support required
 - Consent to register

All support workers at the organisation will be able to assist the client.
 If the client only wants to work with one person that they already know, please enter their full name here

Full name of the support person

0 of 100

* Support required

Done

Care finder

8. Scroll down to the **Consent** section.

There are two sections: The client's consent at the top, and the agent organisation's consent at the bottom.

Select **Yes** or **No** at the Client toggle, followed by the Agent Organisation toggle.

The client must consent for the agent organisation relationship to be created. The agent organisation may consent now, or later. The **Create Relationship** button will activate once the conditions are satisfied.

Then, select **Create Relationship**.

! A Pending agent organisation relationship is created when the client consents but the agent organisation do not consent.

< Back

Add an Agent Organisation

All fields marked with an asterisk (*) are required

Organisation details

- About
- Attachments
- Details and Consent

Create Relationship

Consent

Has Jules Angelstar consented to Council On The Ageing (Vic) Inc / COTA VIC care finder SE Melb accessing their information in My Aged Care in order to assist them to make decisions as their agent? *

I declare that:

- I am voluntarily appointing an agent.
- The information I provide to My Aged Care is complete and correct.

I authorise My Aged Care, including Commonwealth funded service providers and assessors to:

- Collect information about me from my agent.
- Discuss my progress in My Aged Care with my agent.

I understand that:

- Making this Appointment will create a Client Record for me in My Aged Care, if I don't already have one.
- This Appointment is specific to interactions with My Aged Care.
- My agent may receive correspondence about me from My Aged Care.
- I can cancel this Appointment at any time by calling My Aged Care on 1800 200 422 or through my Online Account.
- Giving false or misleading information is a serious offence.

Yes
No

Has Council On The Ageing (Vic) Inc / COTA VIC care finder SE Melb consented to assist Jules Angelstar in My Aged Care, and acknowledged the declaration below.

I declare that:

- Any information my organisation or I provide to My Aged Care about myself, staff, the organisation, or the person being assisted is complete and correct.
- Any information my organisation or I obtain from My Aged Care will be kept confidential and will not be disclosed to any unauthorised person without the permission of the person making this appointment.
- The information provided in this form is complete and correct.

I understand that:

- Making this Appointment will create a record for the person being assisted in My Aged Care, if the person being assisted doesn't already have one.
- This Appointment is specific to interactions with My Aged Care.
- If my organisation or I am the nominated Primary Contact, I (or my organisation) will be the first point of telephone contact for My Aged Care for the person being assisted.
- This Appointment can be cancelled at any time by calling My Aged Care on 1800 200 422 or through the Service and Support Portal.
- I must inform My Aged Care of any changes to my address and contact details, and changes in the circumstances of the person who has appointed me.
- Giving false or misleading information is a serious offence.
- I may receive correspondence on behalf of the Aged Care Client I am assisting.

Yes
No

If a particular agent was nominated, then the name of that agent is displayed in the Consent declaration instead.

< Back

Add an Agent Organisation

All fields marked with an asterisk (*) are required

Organisation details

- About
- Attachments
- Details and Consent

Consent

Has Jules Angelstar consented to Agatha Agent at Council On The Ageing (Vic) Inc / COTA VIC care finder SE Melb accessing their information in My Aged Care in order to assist them to make decisions as their agent? *

I declare that:

- I am voluntarily appointing an agent.
- The information I provide to My Aged Care is complete and correct.

I authorise My Aged Care, including Commonwealth funded service providers and assessors to:

- Collect information about me from my agent.
- Discuss my progress in My Aged Care with my agent.

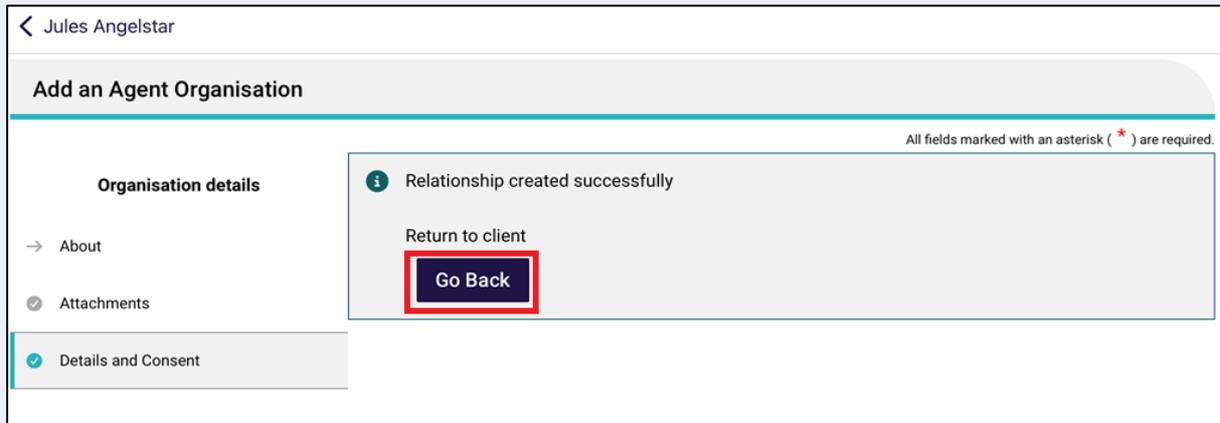
I understand that:

- Making this Appointment will create a Client Record for me in My Aged Care, if I don't already have one.
- This Appointment is specific to interactions with My Aged Care.
- My agent may receive correspondence about me from My Aged Care.
- I can cancel this Appointment at any time by calling My Aged Care on 1800 200 422 or through my Online Account.
- Giving false or misleading information is a serious offence.

Yes
No



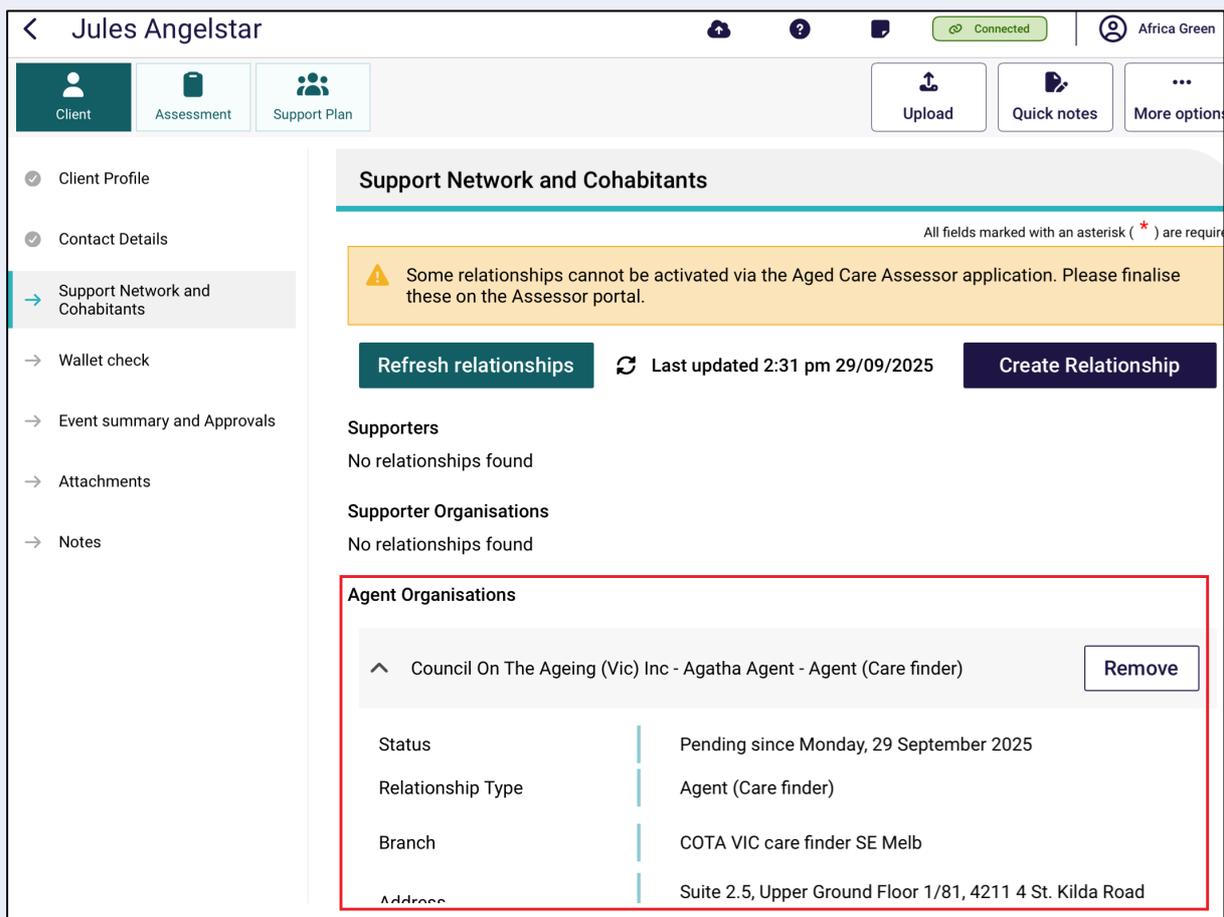
9. The agent organisation relationship is created. Select **Go Back** to return to the client record.



10. Once on the client's record, the new agent organisation relationship will be visible.

Some relationships cannot be activated via this app. An information banner will appear at the top section of the **Support Network and Cohabitants** page. Please finalise these on the Assessor portal.

This example shows a Pending agent organisation relationship with a particular agent named Agatha Agent.

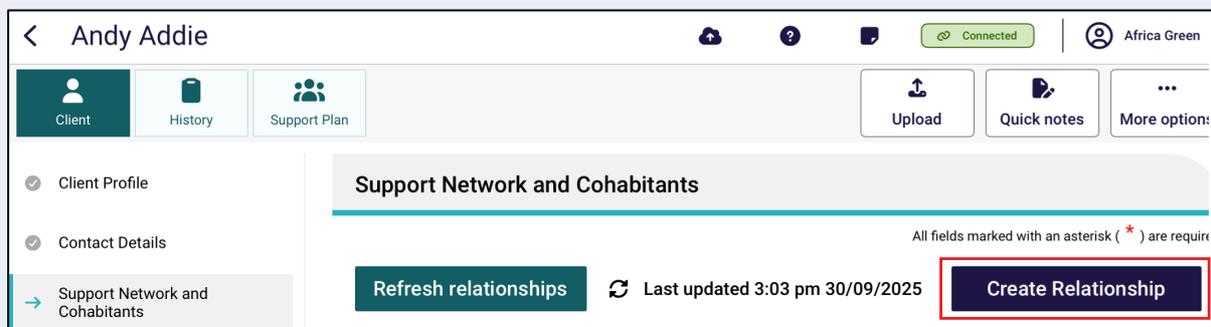


9.5 Creating a relationship for a carer or other support people

You can create a relationship for the client with a carer, emergency contact, GP (General Practitioner) or support person.

Please note, the support person does not have to be present, and consent is not required.

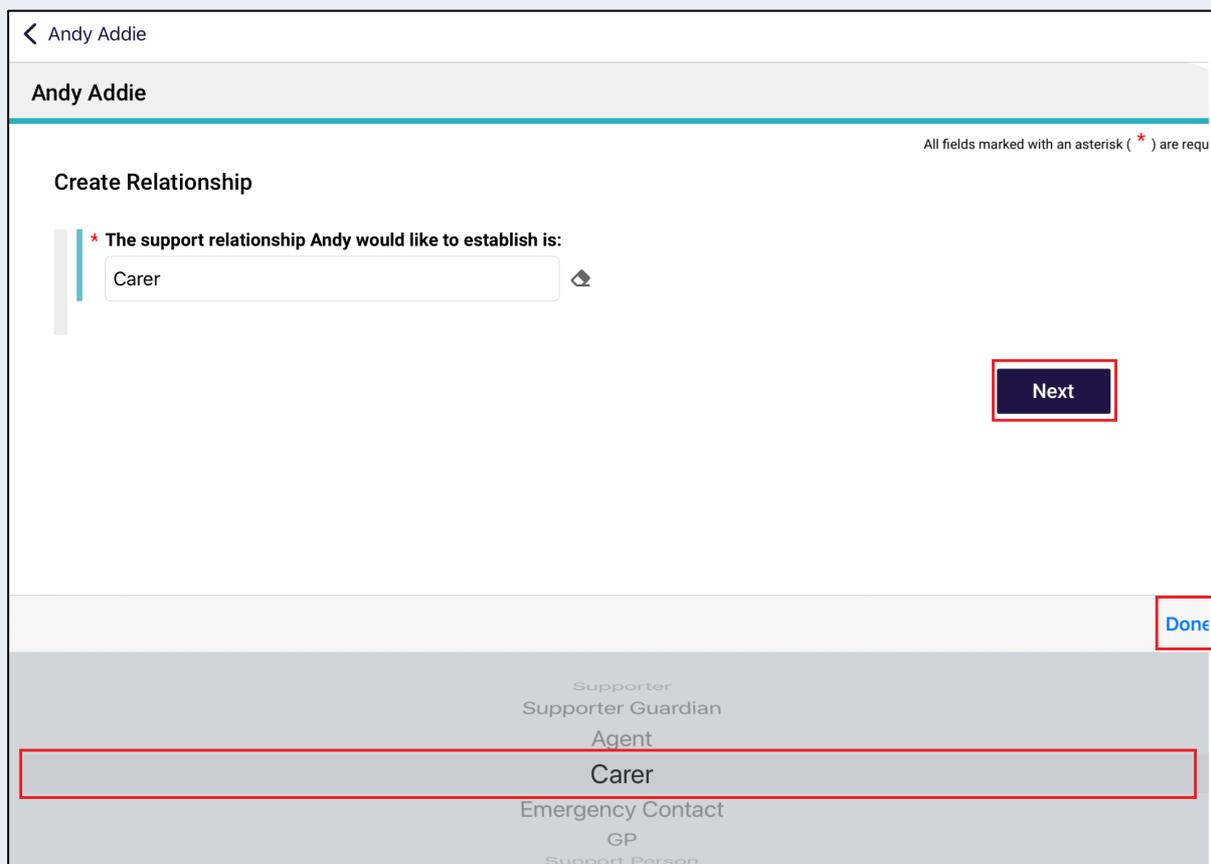
1. On the client's **Support Network and Cohabitants** page in client details, select **Create Relationship**.



2. In the **Create Relationship** page, choose a relationship to establish for the client. In this case it would be **Carer**, **Emergency Contact**, **GP** or **Support Person**.

Then, select **Next**.

! The below screenshots refer to creating a Carer relationship. Depending on the relationship chosen, the following steps may vary.



3. Search for your support person by entering **Last name**, **First name** and/or **Aged Care User ID**, then select **Search**. You can also select **Advanced search**. (Searching is unavailable for Emergency Contacts. Go to Step 4A to the **Save a Support Person** page instead.)



Find a support person

Before registering a new client, check the client exists

First name Last name Aged Care ID

0 of 50 0 of 50 AC- eg. 12345678 0 of 8

> Advanced search

Search

4. Select your support person, then go to step 5.

Search results

If you can't find the Support person record, try other search parameters or [Create Supporter Relationship](#)

Results 1 found - search again, select an existing client or register a new client.

Ginny Weasley Active

78 HODDLE Street, ROBERTSON, NSW 2577

Aged Care ID AC06439665

Phone 0212345678 (home)

[Create Supporter Relationship](#)

If you cannot find the support person's record, try other search parameters or select **Register a Support Person**, then go to step 4A.

Find a support person

Before registering a new client, check the client exists

First name Last name Aged Care ID

Henry Goldsborough AC- eg. 12345678

5 of 50 12 of 50 0 of 8

> Advanced search

Search

No records returned

[Create Supporter Relationship](#)

4A. To register a new support person, Enter all mandatory fields in each of the pages shown with red asterixes, and until the **Register** button turns blue. Then, select **Register** and go to Step 8.

The number and type of pages will vary depending on the relationship being created.



Search Results

Register a Support Person

All fields marked with an asterisk (*) are required

- Personal details
- Address details
- Identity Match
- Call back details
- Details and Consent

The following fields are mandatory or invalid:

- Date of Birth age must be between 1 and 129 years old
- Gender

Title

*** First name**

 5 of 50

Middle name

 0 of 50

*** Last name**

 6 of 50

*** Gender**

Date of birth / estimated age*

Please enter the date of birth. If not known, enter the client's estimated age.

! Complete the **Call Back Details** page to register a **Carer relationship**.

To be able to request call back from Carer Gateway and/or National Dementia Helpline, the client's home address and at least one contact number is required. This is entered in the Address Details page.

Search Results

Register a Support Person

All fields marked with an asterisk (*) are required

- Personal details
- Address details
- Identity Match
- Call back details
- Details and Consent

Call back details

Request call back from Carer Gateway *

Client's consent for Carer Gateway *

Carer's consent for Carer Gateway *

Request call back from National Dementia Helpline *

Client's consent for National Dementia Helpline *

Carer's consent for National Dementia Helpline *

Client contact details

Contact number

Email address



5. Once you have selected the supporter's record from Step 4, the **About** page appears. Double check the details are correct (including contact details), then go to the **Call Back Details** page.

Ginny Weasley's Details

→ About

→ Call back details

→ Details and Consent

Health Insurance
No health insurance provided

Address details

Home address: 78-80 HODDLE Street
ROBERTSON
NSW 2577

Service delivery address: 78-80 HODDLE Street
ROBERTSON
NSW 2577

Send any correspondence to: 78-80 HODDLE Street
ROBERTSON
NSW 2577

Contact details

Preferred contact method:

Home phone: 0212345678 (home)

Mobile:

Business:

Other:

Fax:

Email: ginny.weasley@hp.com.au (email)

Create relationship

6. The **Call Back Details** page appears.

! Complete the **Call Back Details** page to register a **Carer relationship**.

This page is not applicable to other relationship types.

To be able to request call back from Carer Gateway and/or National Dementia Helpline, the home address and at least one contact number of both the client and the carer are required.

These details are also required in order to progress to the **Details and Consent** page and to finish creating the Carer relationship.

If there are such details missing, the carer or client may need to go back to their own client profile to update the details (for example in their My Aged Care Online Portal), before coming back here to finish making the relationship.

Fill in all mandatory fields and go to the next page, **Details and Consent**.

Ginny Weasley's Details

→ About

→ Call back details

→ **Details and Consent**

Call back details

Request call back from Carer Gateway *

Yes No

Client's consent for Carer Gateway *

Yes No

Carer's consent for Carer Gateway *

Yes No

Request call back from National Dementia Helpline *

Yes No

Client's consent for National Dementia Helpline *

Yes No

Carer's consent for National Dementia Helpline *

Yes No

Client contact details

Contact number +610298765432

Email address Janderson@mac.com.au

Home address 2 HARGRAVE Street
MORAYFIELD
QLD 4506

Carer contact details

Contact number

Email address ginny.weasley@hp.com.au

Home address 78 HODDLE Street
ROBERTSON
NSW 2577

*** Residential Region**

South-Eastern NSW including Goulburn and Woll... ↕

If the carer is located in NSW, you will need to select what region they live in, this is because there are four different Carer Gateway Service Providers who service NSW.

Create relationship

7. The **Details and Consent** page displays. Fill in all mandatory fields, then select **Create relationship**. There is no consent required for a Carer relationship.

Ginny Weasley's Details

→ About

→ Call back details

→ **Details and Consent**

Details

*** Relationship type**

Friend ↕

Consent

Not required

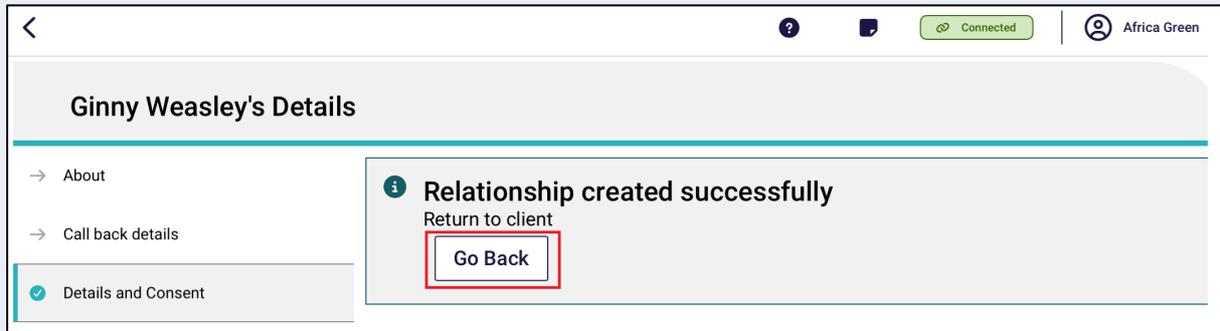
Create relationship



! There is no Consent section for an Emergency Contact relationship or a Support Person relationship.

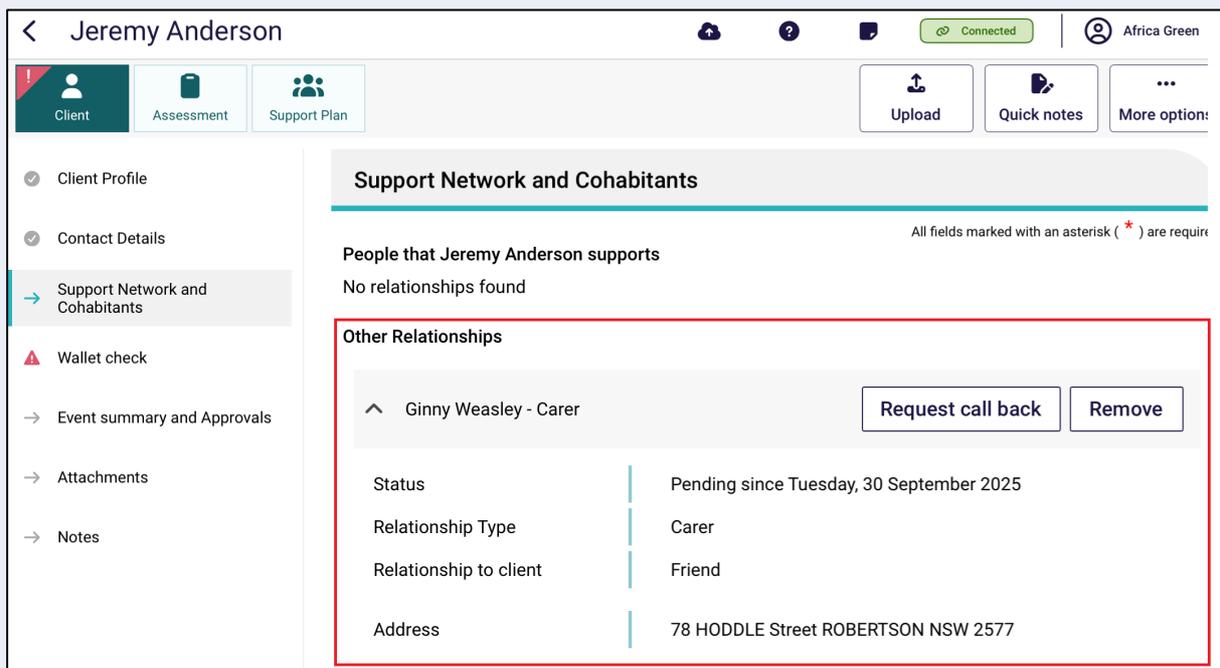
There are no Details or Consent sections for a GP Relationship.

8. The relationship is now created successfully. Select **Go Back**.

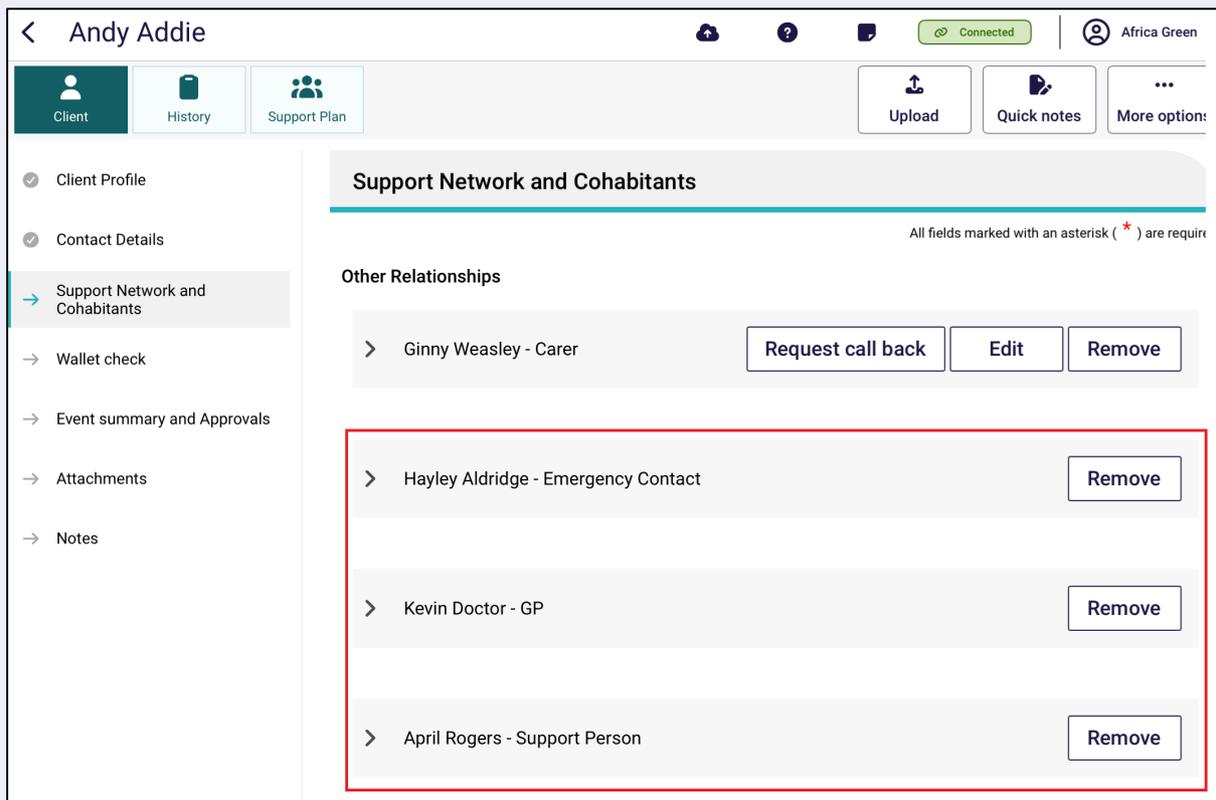


9. The support person relationship is now displayed on the client's **Support Network and Cohabitants** page.

In the case of a carer relationship, there are additional buttons: **Request call back** which registers call back consent, **Edit**, and **Remove**.



The below images show examples of other relationships, such as Emergency Contact, GP and Support Person.



9.6 Creating a relationship in offline mode

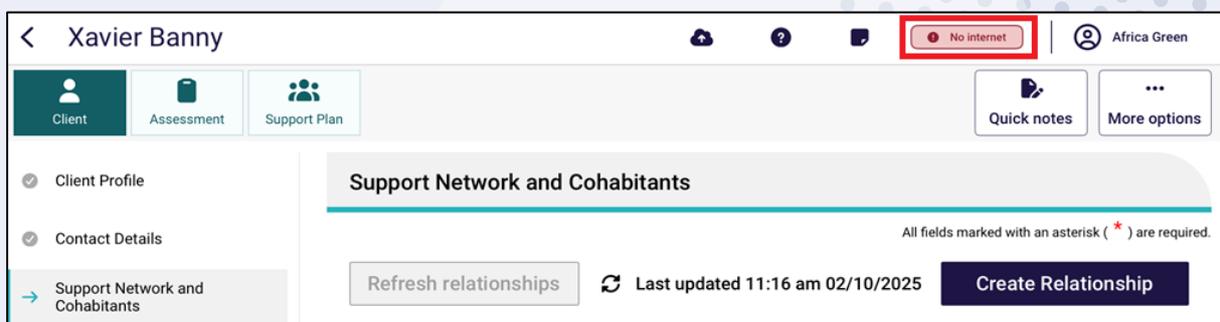
To create a supporter relationship while the App is in offline mode, follow the steps below.

! You must be online to register and set up a relationship. Any support people created offline will be saved locally to your device. Relationships created offline will have a visual indicator to identify that they have been created locally to the device.



You must register the relationship before you can upload the assessment. To do this select **Register** against the local record and follow [step 4A in Creating a relationship for a carer or other support people](#).

1. Navigate to the **Support Network and Cohabitants** section and select the **Create Relationship** button.



2. Fill in all the supporter's mandatory information until each page has a tick next to it as per the instructions in the section [Creating a relationship for an individual supporter or supporter lite](#) or [Creating a relationship for a carer or other support people](#).



< Back

Save a Supporter

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

- Personal details
- Address details
- Identity Match
- Attachments
- Details and Consent**

Details

The following fields are mandatory or invalid:

- Relationship Type
- Consent from relevant parties to establish support relationship

* Relationship type

Please select a start date for this relationship, and enter an end date if it will be time limited.

* Start date

21/05/2025

End date

- In the Details and Consent page, toggle Yes or No for each person's consent and conflict of interest details as appropriate. Then, select **Save**.

< Back

Save a Supporter

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

- Personal details
- Address details
- Identity Match
- Attachments
- Details and Consent**

Supporter consent

Has this support person consented to register?

George Washington consents to being registered as a supporter under the Aged Care Act 2024 for the Mary Contrary. George Washington understands that they may request, access and receive information and documents, and communicate information, in line with the client's will and preferences, to support them to do a thing under, or for the purposes of, the Aged Care Act 2024 (other than for the purposes of means testing). George Washington understands that the Australian Privacy Principles will not apply to them if they receive information or documents in their capacity as a supporter outside of Australia. George Washington understands that any other supporters that are registered for the client that they support may also see information about them in their capacity as a supporter, including if their registration is suspended or cancelled.

Yes No

Does this support person have a conflict of interest?

If you have a conflict of interest (either real, potential or perceived) acting as a supporter for the client named in this form, please advise below. For more information regarding what a Conflict of Interest is please visit: [My Aged Care Website](#)

I have a conflict of interest (either real, potential or perceived) acting as a supporter for the client named in this form:

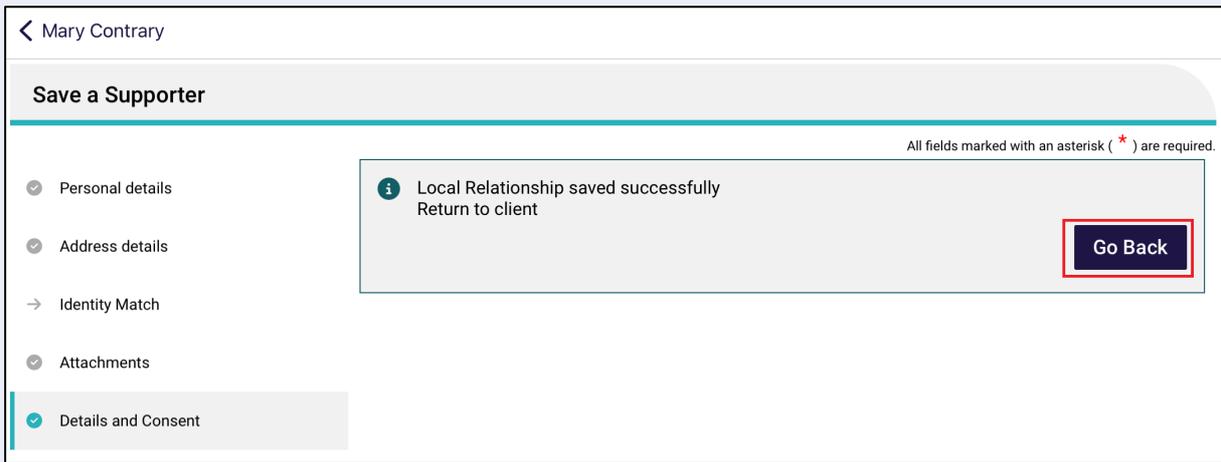
Yes No

Save

! Supporter Guardian relationships are created as Pending only. Use the **Assessor Portal** to complete [activating the relationship](#).

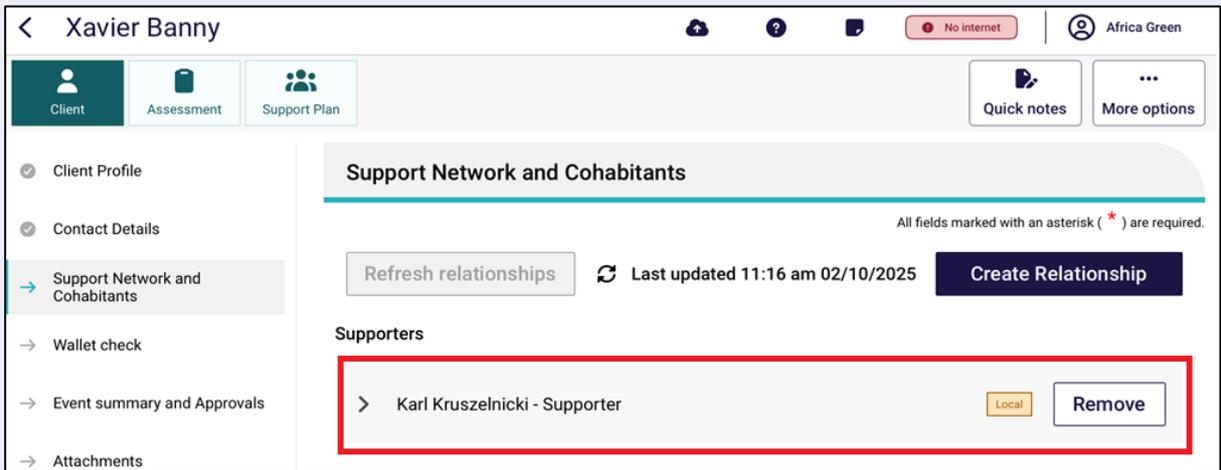
- A banner – **Local Relationship saved successfully** appears. Select **Go Back**.





5. The new supporter relationship will appear on the **Relationships and cohabitants** page. In the case of supporter guardians, a banner appears: **Some relationships cannot be activated via the App. Please finalise these on the Assessor portal.**

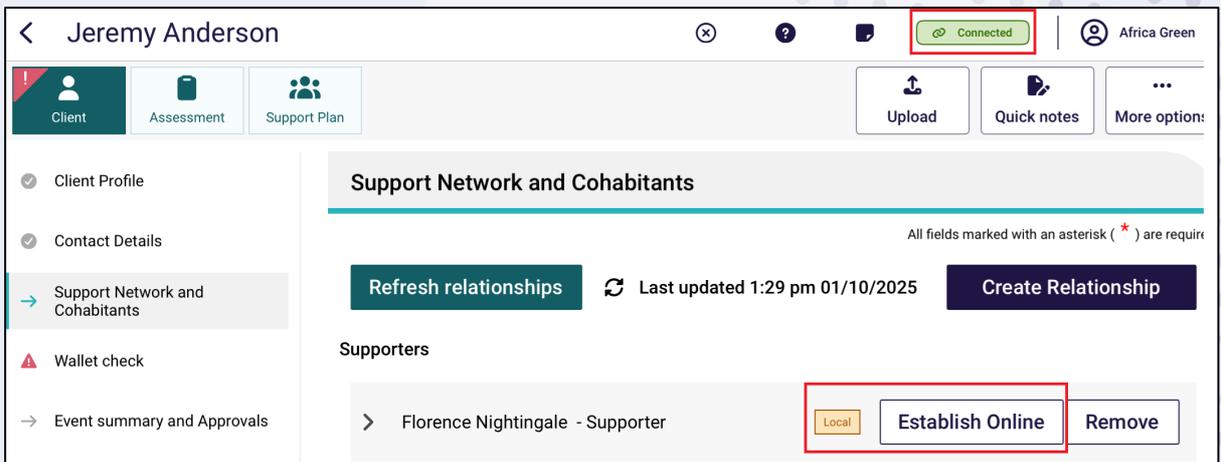
! Relationships made while offline will [need to be established](#) when the Internet is available.



9.7 Establishing an offline relationship

1. To activate (establish) offline relationships, you will need to make sure there is Internet connectivity by checking for the Connected symbol at the top right of the App screen.

Then, select the **Establish Online** button next to the offline (local) relationship listing.



2. The **Register A Supporter** screen appears.

The App will now look for duplicate records in My Aged Care.

If there are duplicate records, an Information message appears at the top of the page. Select **View Potential Matches**.

If there are no duplicate matches, continue to Step 4.

The screenshot shows the 'Register a Supporter' screen for 'Jeremy Anderson'. The page has a left-hand navigation menu with options: Personal details (checked), Address details, Identity Match, Attachments (checked), and Details and Consent (checked). A warning banner at the top right states '5 potential duplicate matches were found' with a 'View Potential Matches' button highlighted in a red box. The main form fields include: Title, First name (Florence, 8 of 50), Middle name (0 of 50), Last name (Nightingale, 12 of 50), and Gender (Female). At the bottom, there is a 'Date of birth / estimated age' section with a 'Register' button and a 'Date of Birth' / 'Estimated Age' toggle.

3. The **Review Potential duplicate client** page appears. Review each duplicate by selecting each record listed on the left column under the **Client details** heading. If you find the correct existing record, select the corresponding **View existing record** button. Otherwise select the **Use new record** button.

< Back

Review potential duplicate client

Client details

- Florence Nightingale

	New client	Existing client
Title		Not Specified
First name	Florence	Florence
Middle name		
Last name	Nightingale	Nightingale
Date of Birth	09/09/1969	09/09/1969
Home phone		
Address		
Mobile phone		(Not Applicable)
Email		
Medicare		
DVA No		
CRN		
ACMPS		

4. For new client records, there are five pages in the **Register a Supporter** section: **Personal Details, Address Details, Identity Match, Attachments, and Details and Consent.**

For existing records, there may be fewer pages to review – usually **About, Attachments, and Details and Consent.**

Ensure all mandatory fields are entered or updated in each page until the **Register** button or the **Create Relationship** button turns blue. Some of these fields may have been pre-filled based on what you have entered whilst the relationship was offline.

Then, select **Register**, or **Create Relationship**.



Existing Record example

← ? Connected Africa Green

Florence Nightingale's Details

- About
- Attachments
- Details and Consent

Personal Information

No personal information provided

Preference for First Nations Assessment Organisation to do their assessment: Not specified

Communication requirements

No communication requirements provided

Identity documents (ID)

Medicare Card Number:

Department of Veterans' Affairs (DVA) Card Number:

Centrelink Customer Reference Number (CRN):

Aged Care Management Payment System (ACMPS) Number:

System for the Payment of Aged Residential Care (SPARC) Number:

Aged Care ID: AC54314984

Identity status

Not Attempted

Health Insurance

No health insurance provided

Create relationship

New Record Example

← Jeremy Anderson

Register a Supporter

All fields marked with an asterisk (*) are required

- ✓ Personal details
- Address details
- Identity Match
- ✓ Attachments
- ✓ Details and Consent

Title

* First name

Florence 8 of 50

Middle name

* Last name

Nightingale 11 of 50

* Gender

Female

Date of birth / estimated age *

Please enter the date of birth. If not known, enter the client's estimated age.

Date of Birth Estimated Age

* Date of birth

09/09/1969

Register

! For information on how to fill out each page during the **Register A Supporter** process, refer to the subheadings relating to each type of relationship in [Registering a support person](#).



9.8 Activating a pending relationship

A Pending Relationship is created on a client's record if:

- the older person or their supporter do not provide their consent for the relationship to be set up
- the start date of the relationship is in the future
- a supporter guardian relationship is being created.

To activate a pending relationship, follow the steps below. You **must** be connected to the Internet.

1. In the client's **Support Network and Cohabitants** page, select **Activate**.

The screenshot shows the 'Support Network and Cohabitants' page for client Xavier Banny. The page has a navigation menu on the left with options like Client Profile, Contact Details, Support Network and Cohabitants, Wallet check, Event summary and Approvals, Attachments, and Notes. The main content area is titled 'Support Network and Cohabitants' and includes a 'Refresh relationships' button, a 'Last updated' timestamp, and a 'Create Relationship' button. Below this, there are sections for 'Supporters', 'Supporter Organisations', and 'Agent Organisations'. Under 'Agent Organisations', there is a list item for 'CRSixThreeEightEFT02 - Agent (Advocate)' with an 'Activate' button highlighted in red and a 'Remove' button.

! Some relationships cannot be activated via this app. Please finalise those on the Assessor Portal instead. These relationships will have a warning banner on top of the page:

Some relationships cannot be activated via the Aged Care Assessor application. Please finalise these on the Assessor portal.

2. From the **Activation** page, Check that the information is still correct and update if required.

The screenshot shows the 'Activation' page for client Xavier Banny. The page has a 'Details' section with the following fields: 'Full name of the support person' (text input), '* Support required' (dropdown menu set to 'Advocate'), '* Start date' (calendar picker set to 02/10/2025), and 'End date' (calendar picker). The page also includes a warning banner at the top right stating 'All fields marked with an asterisk (*) are required.'



3. Scroll down to the **Consent** section. Update the supporter's consent as required then select **Activate**.

(All parties must select **Yes** to their consent section for the relationship to activate.)

← Xavier Banny

Activation

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

Consent

Has Xavier Banny consented to CRSixThreeEightEFT02 / AgentOnly Outlet accessing their information in My Aged Care in order to assist them to make decisions as their agent? *

I declare that:

- I am voluntarily appointing an agent.
- The information I provide to My Aged Care is complete and correct.

I authorise My Aged Care, including Commonwealth funded service providers and assessors to:

- Collect information about me from my agent.
- Discuss my progress in My Aged Care with my agent.

I understand that:

- Making this Appointment will create a Client Record for me in My Aged Care, if I don't already have one.
- This Appointment is specific to interactions with My Aged Care.
- My agent may receive correspondence about me from My Aged Care.
- I can cancel this Appointment at any time by calling My Aged Care on 1800 200 422 or through my Online Account.
- Giving false or misleading information is a serious offence.

Yes No

Has CRSixThreeEightEFT02 / AgentOnly Outlet consented to assist Xavier Banny in My Aged Care, and acknowledged the declaration below.

I declare that:

- Any information my organisation or I provide to My Aged Care about myself, staff, the organisation, or the person being assisted is complete and correct.
- Any information my organisation or I obtain from My Aged Care will be kept confidential and will not be disclosed to any unauthorised person without the permission of the person making this appointment.
- The information provided in this form is complete and correct.

I understand that:

- Making this Appointment will create a record for the person being assisted in My Aged Care, if the person being assisted doesn't already have one.
- This Appointment is specific to interactions with My Aged Care.
- If my organisation or I am the nominated Primary Contact, I (or my organisation) will be the first point of telephone contact for My Aged Care for the person being assisted.
- This Appointment can be cancelled at any time by calling My Aged Care on 1800 200 422 or through the Service and Support Portal.
- I must inform My Aged Care of any changes to my address and contact details, and changes in the circumstances of the person who has appointed me.
- Giving false or misleading information is a serious offence.
- I may receive correspondence on behalf of the Aged Care Client I am assisting.

Yes No

4. The **Activation** page will then change to display a banner which confirm that the relationship has been successfully activated. Select **Go Back**.

← Xavier Banny

Activation

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

i Relationship activated successfully

Return to client



5. The relationship will now show as active in the client's support network and cohabitants tab.

Client Profile

Contact Details

Support Network and Cohabitants

Wallet check

Event summary and Approvals

Attachments

Notes

Support Network and Cohabitants

All fields marked with an asterisk (*) are required

Refresh relationships Last updated 10:49 am 02/10/2025 Create Relationship

Supporters
No relationships found

Supporter Organisations
No relationships found

Agent Organisations

CRSixThreeEightEFT02 - Agent (Advocate) Remove

Status	Active since Thursday, 2 October 2025
Relationship Type	Agent (Advocate)
Can make decisions about	Advocate
Branch	AgentOnly Outlet
Address	6 FURZER Street PHILLIP ACT 2606

9.9 Removing a support relationship

To remove an active or pending relationship:

1. Select the **Remove** button on the support relationship's listing in the client's profile.

Client Profile

Contact Details

Support Network and Cohabitants

Wallet check

Event summary and Approvals

Attachments

Notes

Support Network and Cohabitants

All fields marked with an asterisk (*) are required

Finalise Upload Quick notes More options

Refresh relationships Last updated 12:09 pm 02/10/2025 Create Relationship

Supporters

Marilyn Monroe - Supporter Edit Remove

Thomas Tank - Supporter Activate Remove

2. Select **Remove** on the next page. Some relationships require a reason, such as **Appoint Another Supporter, No Longer Required, Other, Unable to Fulfill Duties, or Unaware of Relationship**.



← Mary Contrary

Remove Marilyn Monroe

Are you sure you would like to remove this relationship?

* Please select the reason for removal

No Longer Required

Remove Cancel

Done

Appoint Another Supporter
No Longer Required
Other
Unable to Fulfill Duties
Unaware of Relationship

3. Removed relationships will show under the **Declined and ended relationships** section in the Support Network and Cohabitants section.

← Mary Contrary

Client Assessment Support Plan Finalise Upload Quick notes More options

Client Profile Contact Details Support Network and Cohabitants Wallet check Event summary and Approvals Attachments Notes

Support Network and Cohabitants

All fields marked with an asterisk (*) are require

Declined, ended and cancelled relationships

Supporters

^ Marilyn Monroe - Supporter

Status	Inactive on Thursday, 2 October 2025
Relationship Type	Supporter
Relationship to client	Neighbour
Address	



10. Completing identity verification

To conduct identity verification (a wallet check), follow the steps below.

1. Open and log in to the App with your password, following the process in [Signing in to the App after activation](#). The Dashboard will be displayed. Select the client's name on the referral card.

Dashboard

Filters 10 assessments, sorted by Client Last Name

Client Name	Referral Status	Priority	Assessment Status	Completed
Jonas Abdullah	Self referral	Medium priority	Triage in progress	18 days overdue
Jonas Abrego	Self referral	Medium priority	Triage not started	18 days overdue
Harry Boyer	Self referral	Low priority	Assessment in progress	No current milestone
Harry Cleora	Self referral	High priority	Triage not started	26 days overdue
Harry Goff	Self referral	Medium priority	Triage in progress	7 days overdue
Harry Jones	Self referral	Medium priority	Assessment not started	18 days overdue
Harry Miller	Self referral	Low priority	Assessment not started	ALICE SPRINGS, NT, 0870
Harry Nichols	Self referral	Low priority	Triage not started	
UATFred RTAGT...	Assessment not started	High priority	Assessment not started	

2. Select **Wallet check**. The status of the wallet check will be displayed. To conduct a wallet check select **Conduct a wallet check**.

Harry Boyer

Client Profile

Wallet check

The client has not yet completed a wallet check

Conduct a wallet check

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



3. A page is displayed to record whether the client has identification that will allow you to complete the process.

Harry Boyer

Client Assessment Support Plan

Upload Quick notes More options

Client Profile

Contact Details

Support Network and Cohabitants

Wallet check

Event summary and Approvals

Attachments

Notes

Wallet check

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

My client has identification

My client has no valid ID at this time

My client is unable to produce ID

Cancel Complete

If you have selected:

- **My client has identification**, go to step 4.
- **My client has no valid ID at this time** you will receive a message confirming that a wallet check should be completed at a later date. Go to step 5.

Harry Boyer

Client Assessment Support Plan

Upload Quick notes More options

Client Profile

Contact Details

Support Network and Cohabitants

Wallet check

Event summary and Approvals

Attachments

Notes

Wallet check

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

My client has identification

My client has no valid ID at this time

My client is unable to produce ID

i You are recording that at this time the client has no valid identification and should be asked again in the future.

Cancel Complete

- **My client is unable to produce ID**, a message will be displayed to record that you are unable to complete the wallet check and that it will not be able to be completed at a future date, go to step 5.



Harry Boyer

Client Profile

Wallet check

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

My client has identification

My client has no valid ID at this time

My client is unable to produce ID

i You are recording that the client cannot complete a wallet check and should not be asked again in the future.

Cancel Complete

4. The page will be expanded to allow you to record the type of documentation sighted, and the date that you performed the wallet check. You will need to sight at least two types of identification to complete the wallet check.

Harry Boyer

Client Profile

Wallet check

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

My client has identification

My client has no valid ID at this time

My client is unable to produce ID

i Please check two types of ID from the following list. If you do not select two documents, the wallet check cannot be uploaded, and the information will be discarded during the upload process. By ticking each box, you are confirming that you have sighted the original document.

Common types of identification

Medicare Card

DVA Card

Drivers License

Health Care Card

Passport

! Select **Show more types of identification that can be sighted** to display additional identity documents that may be used for identity verification, for example, Birth Certificate, Australian Aged Pension, Pensioner Concession Card etc.

5. Select **Complete**.

- If you successfully completed the Wallet check, an information message will display to confirm that the Wallet check has been completed.

Harry Boyer

Client Assessment Support Plan

Upload Quick notes More options

Client Profile

Contact Details

Support Network and Cohabitants

Wallet check

Event summary and Approvals

Wallet check

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

✔ Wallet check has been completed

! If you are unable to sight two identification documents (e.g. the client does not have valid ID), a reminder to complete a wallet check will display on the client record until a wallet check can be completed. This will not prevent you from completing an assessment.

11. Undertaking assessments

Needs assessors can use the App to:

- undertake assessments for client's referrals they have downloaded
- undertake assessments for offline clients they have saved locally to their device
- undertake Residential Respite Assessments.

! The App will display the same sections of the assessment that are available for assessors in the My Aged Care assessor portal.

The steps to undertake an assessment on the App are as follows.

- Open and log in to the App, following the process in [Signing in to the App after activation](#). The Dashboard will be displayed. Then, select the client's name that you are wishing to assess.

Aaron Jones

Self referral Medium priority

Aged Care ID

Assessment type Home Support Assessment

Assessment status Triage in progress

Completed Triage due by 21/09/2024 (16 days overdue)

Ace Sharp

Self referral Medium priority

Aged Care ID

Assessment type Comprehensive Assessment

Assessment status In progress

Completed Support Plan 07/10/2024 (due today)

Aadi Smith

Self referral Medium priority

Aged Care ID

Assessment type Home Support Assessment

Assessment status Triage in progress

Completed Triage due by 21/09/2024 (16 days overdue)

Adrian Smith

Self referral Medium priority

Aged Care ID

Assessment type Home Support Assessment

Assessment status Triage not started

Completed Triage due by 21/09/2024 (16 days overdue)

Sync Referrals

New Assessment

No backups pending



2. Select **Start Assessment**.

Georgina Smith, AC36322840, born 15 April 1941, 84 Years.
Select an option to see more information.

Start Assessment

Refer urgent services

Remove from device

Flag End-of-Life Pathway

Assessment Consent

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

3. Select the relevant radio box for who has provided consent to the assessment as well as if you would like to pre-populate the IAT questions or start a blank assessment. Then select **Confirm**.

You are about to start a Home Support Assessment for Georgina Smith, AC36322840, born 15 April 1941, 84 Years. If the person's details are incorrect, a privacy breach may occur.

Please be advised that without capturing the consent, you cannot proceed any further with the assessment.

Start Assessment

Refer urgent services

Remove from device

Flag End-of-Life Pathway

Assessment Consent

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

Consent obtained from?

The client

The client with support person

Consent was not given

The supporter guardian

About consent

Capacity to give consent

When and how to seek consent

Consent script

* Would you like to pre-populate the IAT questions from previously collected information?

Yes

Blank assessment

Confirm

4. The **Assessment Details** page will display, and the assessment can be commenced from here.

For comprehensive assessors, the **First Intervention of a Clinical Nature** page will display.

Mandatory fields are identifiable by red asterisks, and prior to completing mandatory information a red triangle will display in the top right-hand side of the box. Once a mandatory question is answered, this triangle disappears. This feature helps to identify whether all mandatory questions have been answered in each section.



Georgina Smith

Client Assessment Support Plan Finalise Upload Quick notes Clear page information More options

Triage

Assessment Details

Reason for assessment

Carer profile

Medical and Medications

Function

Physical, Personal Health and Frailty

Social

Cognition

Behaviour

Psychological

Home and Personal Safety

Assessment Details

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

* Date of assessment

* Participants consulted prior to the assessment

Yes No

* Mode of assessment

Face-to-face Over-the-phone Via tele-health

* Assessment setting

Client's home
Carer's home
Other community setting
Residential aged care service

At the bottom of each page, Select the toggle to acknowledge that you have reviewed the information on the page and confirm that it is correct. Select **Next** to navigate to the next section of the assessment in the App.

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

Back Next

! Cancelling an assessment

You can cancel an assessment from any screen within the App. Select **More options** from the top right of any screen, then select **Cancel assessment** from the pop up that appears.

If you cancel an assessment within the App, your team leader will receive a notification once you have internet connection, and your device has synced with the assessor portal.

Georgina Smith

Client Assessment Support Plan Finalise Upload Quick notes Clear page information More options

Triage

Assessment Details

Reason for assessment

Carer profile

Medical and Medications

Function

Physical, Personal Health and Frailty

Social

Cognition

Social

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

* How many people excluding the client live in the same household as the client?

Assessment options

Remove Client from Device

* Is the client a carer, family member, friend or someone else?

Yes Cancel Assessment

Respite and Emergency Care

* Are there formal and/or informal respite arrangements in place?

Yes No



! Field text limits

There are character limits for free-text fields. The character limits will display at all times. Ensure that you do not exceed these character limits while undertaking the assessment.



Please provide additional details

Maximum 500 characters

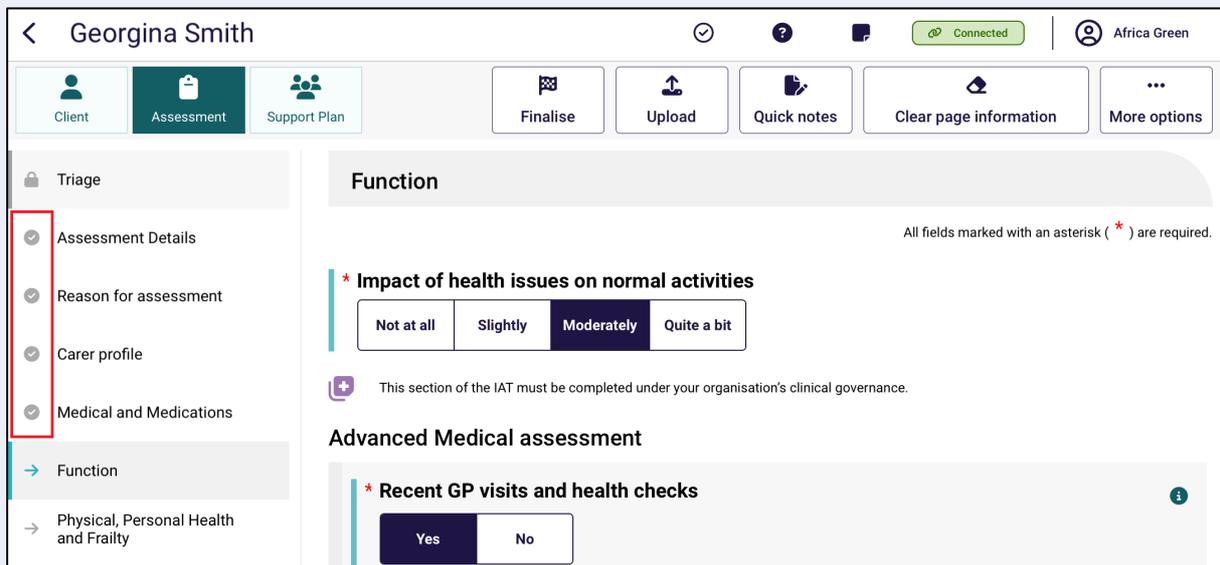
! Clearing information

Selecting **Clear page information** on the top right of any screen will clear any information entered on the current page of the assessment that the Needs assessor is working on.



5. Progress through the sections identified in the Assessment menu. Similar to the My Aged Care assessor portal, a mandatory confirmation box must be completed at the bottom of each section.

A tick will appear beside the relevant section in the **Assessment** menu when all mandatory questions for that section are complete.



Georgina Smith

Client Assessment Support Plan Finalise Upload Quick notes Clear page information More options

Triage

- ✓ Assessment Details
- ✓ Reason for assessment
- ✓ Carer profile
- ✓ Medical and Medications
- Function
- Physical, Personal Health and Frailty

Function

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

* Impact of health issues on normal activities

Not at all Slightly Moderately Quite a bit

This section of the IAT must be completed under your organisation's clinical governance.

Advanced Medical assessment

* Recent GP visits and health checks

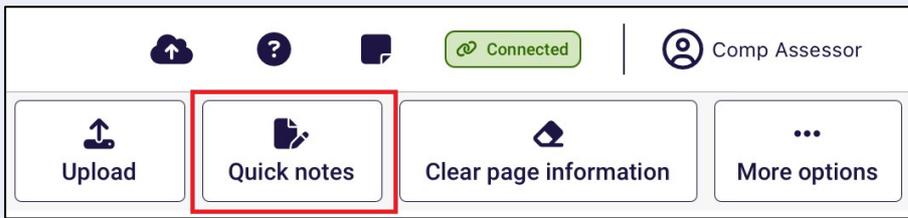
Yes No

6. While progressing through the assessment, needs assessors may choose to use the **Quick notes** feature, which allows notes to be recorded on the App.

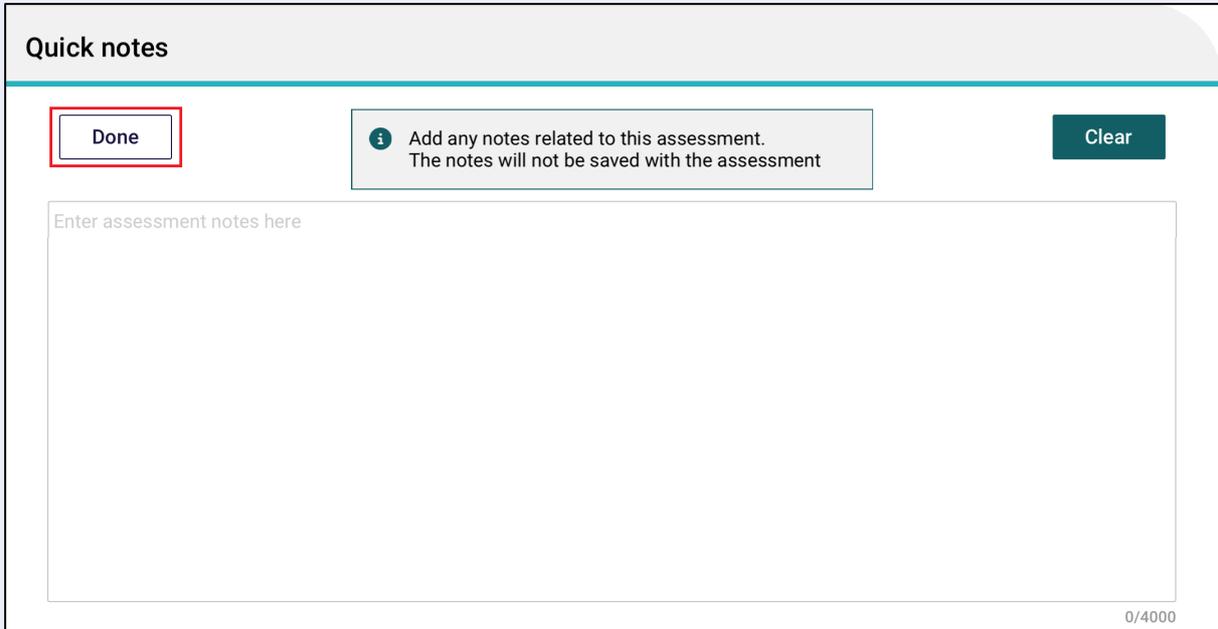
These notes could be sensitive in nature or may be notes that are for later reference during the assessment process.

Select **Quick notes** at the top right corner of the assessment screen to enter.



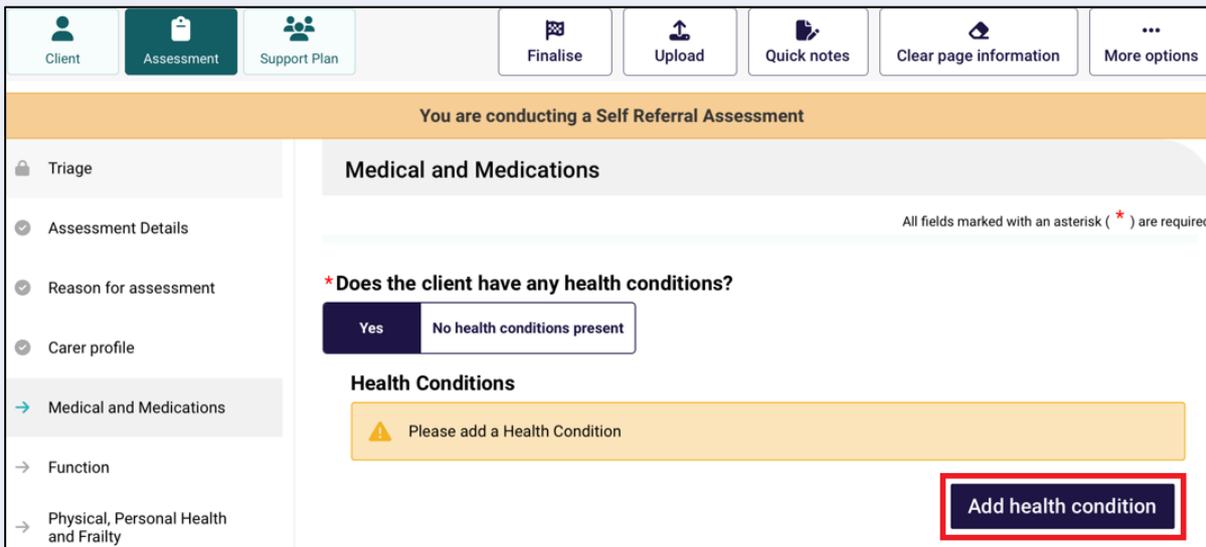


7. Select **Done** to return to the assessment.



! Information captured in this section will not be uploaded to the assessor portal.

8. To add health conditions in the App, follow the same process as the assessor portal. Up to ten health conditions can be added in an assessment. To add a health condition select **Add health condition**.



From the Health condition page, you can then search by the condition name, code list of Health conditions or select by disease category. Select **Save** and close to add the health condition.

Health Conditions

Search by name or ACAP Code

OR

Select by Category

Select

***Health Conditions Description**

 0/500

***Diagnosis status**

Client reported
GP confirmed
Hospital confirmed
Other health practitioner confirmed

Primary Health Condition

Remove health condition **Save and close**

9. In the IAT assessment, validated assessment tools and questions will trigger based on the information recorded by the needs assessor during the assessment. These validated assessment tools are now integrated into the tool, and it will be listed automatically under the relevant section of the assessment that you are completing with the client.



Harry Boyer

Client Assessment Support Plan Finalise Upload Quick notes Clear page information More options

Reason for assessment
Carer profile
Medical and Medications
Function
De Morton Mobility Index (DEMMI) - Modified
Physical, Personal Health and Frailty
Social
Cognition
Behaviour
Psychological
Home and Personal Safety
Financial or Legal

Psychological

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

*** 4. Feeling down, depressed or hopeless last 2 weeks?**

No, not at all
Several days
More than half of the days
Nearly every day

Advanced psychological assessment

*** Has the client experienced stressful events over the past three months (e.g. bereavement, severe illness or injury of self/family/friend, separation from family/partner, major financial loss or being a victim of a crime)**

No Yes

Add as Other Consideration

*** Disturbed sleep/insomnia**

! You should review the MAClearning element Validated Assessment Tools in Practice for further guidance on how and when to administer them with a client during the assessment.

10. Threshold questions are also used throughout IAT to trigger moving the assessment into clinical/comprehensive areas. These questions are identified by a purple icon with text outlining the need for completion under your organisation's clinical governance.

For non-clinical needs assessors, these questions can only be completed with clinical attendance. To proceed in answering these questions under supervision, non-clinical needs assessors must select the **Clinical Supervisor** button from the top banner.

Client Assessment Support Plan Finalise **Clinical Supervisor** Upload Quick notes Clear page information More options

You are conducting a Self Referral Assessment

Triage
Assessment Details
Reason for assessment
Carer profile
Medical and Medications
Function
Revised Faecal Incontinence Scale (RFIS)
Physical, Personal Health and Frailty

Function

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

*** Toileting - Bowels**

Continent Occasional accident (once/week) Incontinent (or needs to be given enemata)

*** Is the client managing bowel incontinence issue?**

Yes No

+ This section of the IAT must be completed under your organisation's clinical governance.

*** Is the client able to complete the Revised Faecal Incontinence Scale (RFIS)**

Yes No

Non-clinical needs assessors must then confirm if they are completing the questions under clinical attendance and select the supervising assessor from the list. Once completed, select **Confirm** to continue. You will be re-directed back to the assessment when you can proceed to complete the assessment with clinical attendance.

Clinical declaration and supervisor details

*** I confirm that I am completing Clinical questions of the IAT under my organisation's clinical governance**

Yes No

Select a supervising assessor for clinical assessment

Back Confirm

Done

Landry Little
Allen Jarvis
Holland Baldwin

11. As needs assessors are progressing through the assessment they can indicate which Needs (Functional needs, Other considerations, Complexity Indicators) and some recommendations to be addressed in the support plan, by selecting **Add as Functional Need**, **Add as Complexity Indicator**, **Add as Other Consideration** and **Add as recommendation** next to the relevant question.

→ Carer profile

→ Medical and Medications

→ Function

→ De Morton Mobility Index (DEMMI) - Modified

→ Physical, Personal Health and Frailty

→ Social

→ Cognition

→ Behaviour

→ Psychological

→ Home and Personal Safety

→ Financial or Legal

→ Support Considerations

Home and Personal Safety

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

Home safety equipment client has

Add as Other Consideration

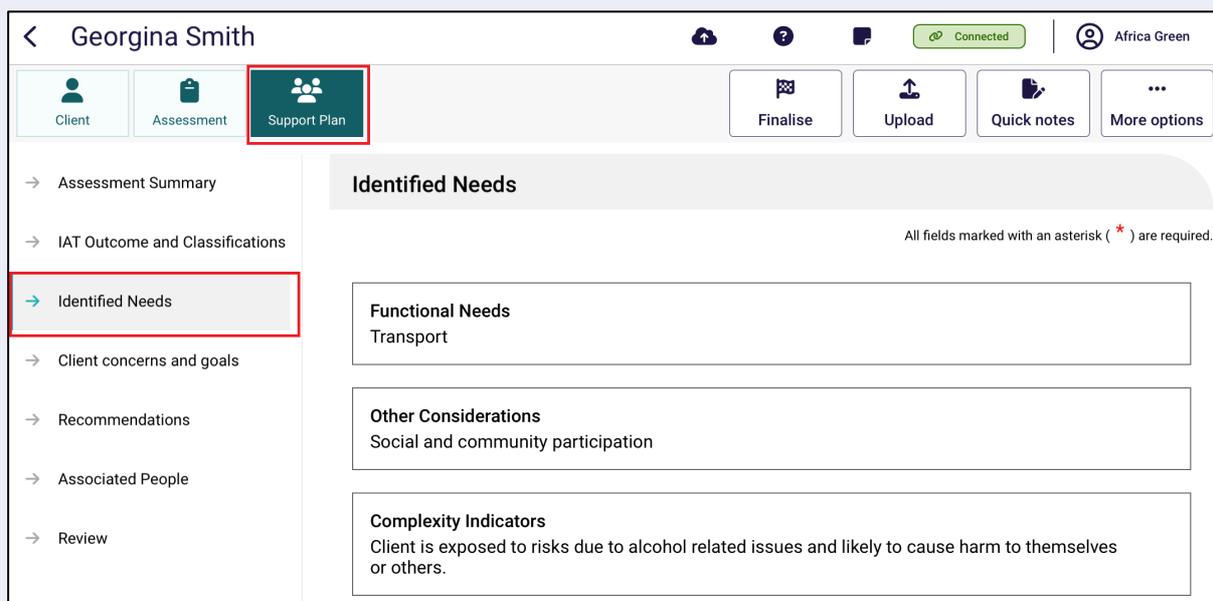
Smoke alarm(s)

Add as Recommendation

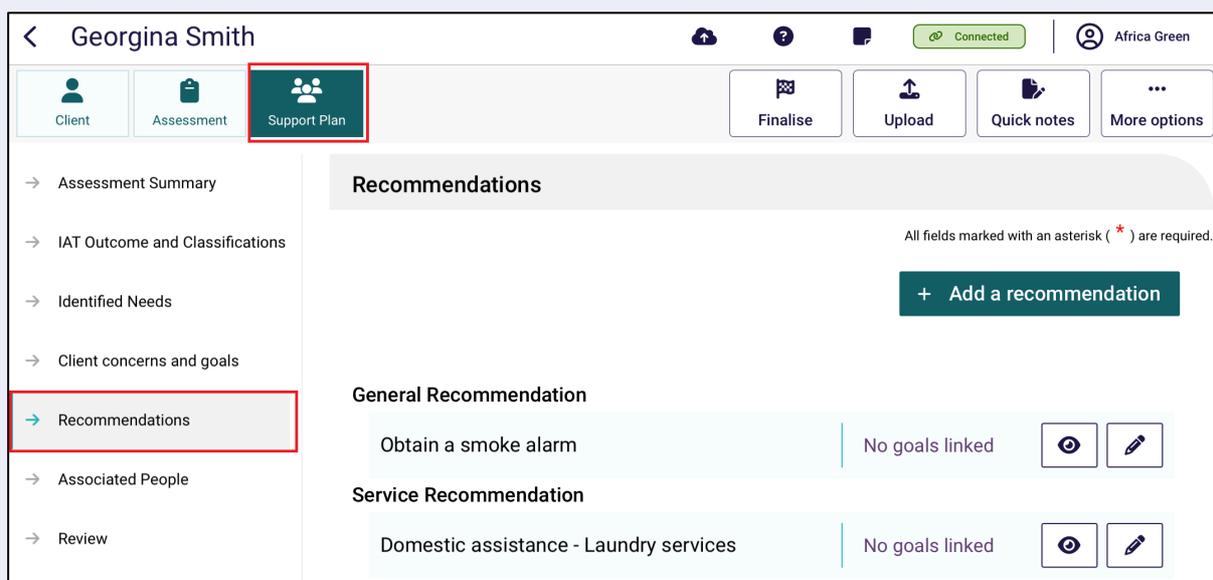
Personal alarm

Add as Recommendation

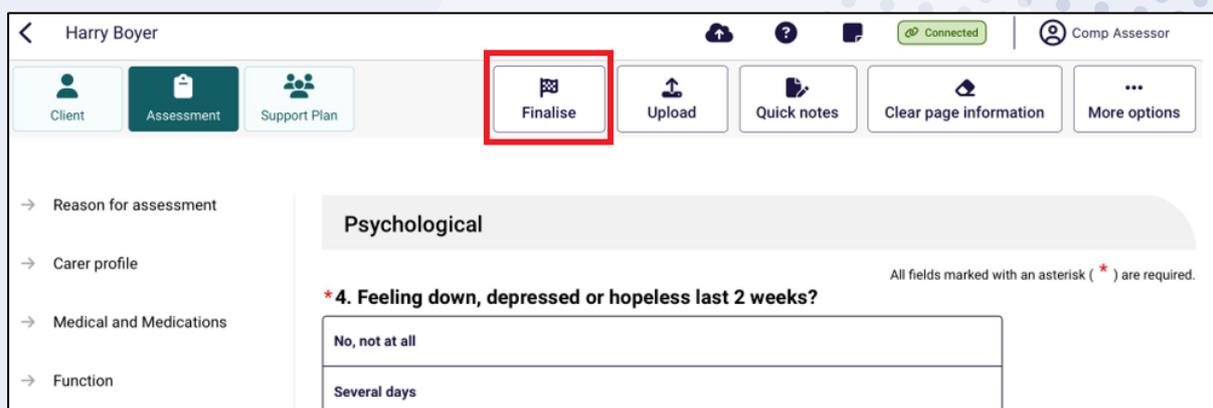
12. In the Support Plan section of the app, any functional needs, other considerations and complexity indicators are displayed in the **Identified Needs** sub-section.



Go to the **Recommendations** sub-section to view and add recommendations.



13. To finalise the assessment, select **Finalise** at the top of the assessment screen.



14. After selecting **Finalise**, record the consent to refer services from the client, or the client with support person, or the supporter guardian (registered supporter), or that the consent was not given.

More information about consent, capacity to give consent, when and how to seek consent, and the consent script are available by selecting the information buttons on the right hand side of the page.

The screenshot shows the 'Finalise IAT' screen. At the top, there is a navigation bar with a back arrow, a help icon, a 'Connected' status, and the user's name 'Africa Green'. Below the title, a message box states: 'You are about to finalise this assessment. Confirm that Georgina Smith, born 15 April 1941, age 84, AC36322840 is the person you are conducting this assessment for. If the person details are incorrect, a privacy breach may occur. An IAT recommendation will be generated. Once finalised, you cannot edit this assessment.' The main section is titled 'Consent to service referrals'. It contains a red-bordered box with the heading '* Consent obtained from:' and four radio button options: 'The client', 'The client with support person' (which is selected), 'Consent was not given', and 'The supporter guardian'. To the right of this box is another red-bordered box containing four information buttons: 'About consent', 'Capacity to give consent', 'When and how to seek consent', and 'Consent script', each with an information icon and a right-pointing arrow.

15. The client can opt to share their Support Plan via their My Health Record. Select **Yes** or **No** based on the client's response.

Then, select whether the consent was obtained from the client or the supporter guardian. If consent was obtained from a supporter guardian, you will also be required to enter their first name before proceeding.

Select **Finalise** to continue. Please note, you will only be able to select **Finalise** once all mandatory fields have been completed.

The screenshot shows the 'Finalise IAT' screen with the question 'Consent to share Support Plan with My Health Record (MHR)?'. Below the question is a red-bordered box containing two buttons: 'Yes' and 'No'. Below this is another red-bordered box with the heading '* Consent obtained from?' and two radio button options: 'Client' (which is selected) and 'Supporter Guardian'. Below these options is a text area labeled 'Comments' with a placeholder 'Maximum 150 characters'. At the bottom right of the screen, there are two buttons: 'Back' and 'Finalise', with the 'Finalise' button highlighted in a red border.



16. A pop-up will then display asking you to finalise the assessment. Please note once you finalise the assessment it cannot be edited. Select **Finalise** to continue.

The screenshot shows the 'Finalise IAT' screen. At the top, there is a navigation bar with a back arrow, a help icon, a 'Connected' status indicator, and a user profile for 'Africa Green'. The main content area is titled 'Finalise IAT'. It contains two sections: 'Consent obtained from?' with radio buttons for 'Client' and 'Supporter Guardian' (selected), and 'Who provided consent?' with input fields for 'First name' (Maeve) and 'Last name' (Harriman). A red-bordered pop-up window titled 'Finalise assessment' is overlaid on the form, containing a warning: 'Warning: You are about to finalise this assessment. An IAT recommendation will be generated. Once finalised, you cannot edit this assessment.' The pop-up has 'Back' and 'Finalise' buttons at the bottom.

12. Developing a support plan

At any point after a client's assessment has been commenced, their support plan can be created and developed within the App.

! Needs assessors will still be required to upload client assessment and Support Plan information to the assessor portal in order to submit to the delegate for approval or match and refer for services.

The sections of the support plan in the App are aligned with the support plan tabs in the assessor portal, and needs assessors can record:

- assessment summary
- IAT outcome and classification
- identified needs
- concerns and goals
- recommendations
- associated people
- Review.

! For further guidance on completing a client's support plan, follow the steps outlined in the [Assessor Portal User Guide 7 completing a support plan and support plan review](#).

1. To commence a support plan for a client who you are assessing, select the client card, and select **Support Plan** from the top left menu. The **Assessment summary** will display. The Assessment summary will be pre-filled with information captured during the assessment.

Georgina Smith

Client Assessment Support Plan

Upload Quick notes Clear page information More options

→ Assessment Summary

→ IAT Outcome and Classifications

→ Identified Needs

→ Client concerns and goals

→ Recommendations

→ Associated People

→ Review

Assessment Summary

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

Georgina experiences [Please enter the 'Assessor notes on cognition' in Assessment -> Cognition]. They also experience [Please enter the 'Assessor notes on behaviours' in Assessment -> Behaviours].

Recommendation
Following assessment, Georgina would benefit from [add outcomes].

Georgina has consented for referrals to be sent for [add service referral types].

GRAZIER AGED CARE - ACA - ACT GRAZIER AGED CARE ORG LTD, will review Georgina's support plan on [Please enter a 'Scheduled review date' in Support Plan -> Review] in order to ensure [Please enter a 'Reason for review' in Support Plan -> Review].

Georgina can be contacted via [add details of contact person(s) for the client].

The following people have been provided a copy of Georgina's support plan: [Add details of contact person(s) for the client].

Assessment completed by Africa Green, ACG AO Team Lead, from GRAZIER AGED CARE - ACA - ACT, GRAZIER AGED CARE ORG LTD, [Please fill in the Assessors work phone number].

Flag as draft

1929 of 5000

Edit

2. To edit the assessment summary, select **Edit**.

→ Assessment Summary

→ IAT Outcome and Classifications

→ Identified Needs

→ Client concerns and goals

→ Recommendations

→ Associated People

→ Review

Assessment Summary

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

Georgina experiences [Please enter the 'Assessor notes on cognition' in Assessment -> Cognition]. They also experience [Please enter the 'Assessor notes on behaviours' in Assessment -> Behaviours].

Recommendation
Following assessment, Georgina would benefit from [add outcomes].

Georgina has consented for referrals to be sent for [add service referral types].

GRAZIER AGED CARE - ACA - ACT GRAZIER AGED CARE ORG LTD, will review Georgina's support plan on [Please enter a 'Scheduled review date' in Support Plan -> Review] in order to ensure [Please enter a 'Reason for review' in Support Plan -> Review].

Georgina can be contacted via [add details of contact person(s) for the client].

The following people have been provided a copy of Georgina's support plan: [Add details of contact person(s) for the client].

Assessment completed by Africa Green, ACG AO Team Lead, from GRAZIER AGED CARE - ACA - ACT, GRAZIER AGED CARE ORG LTD, [Please fill in the Assessors work phone number].

Flag as draft

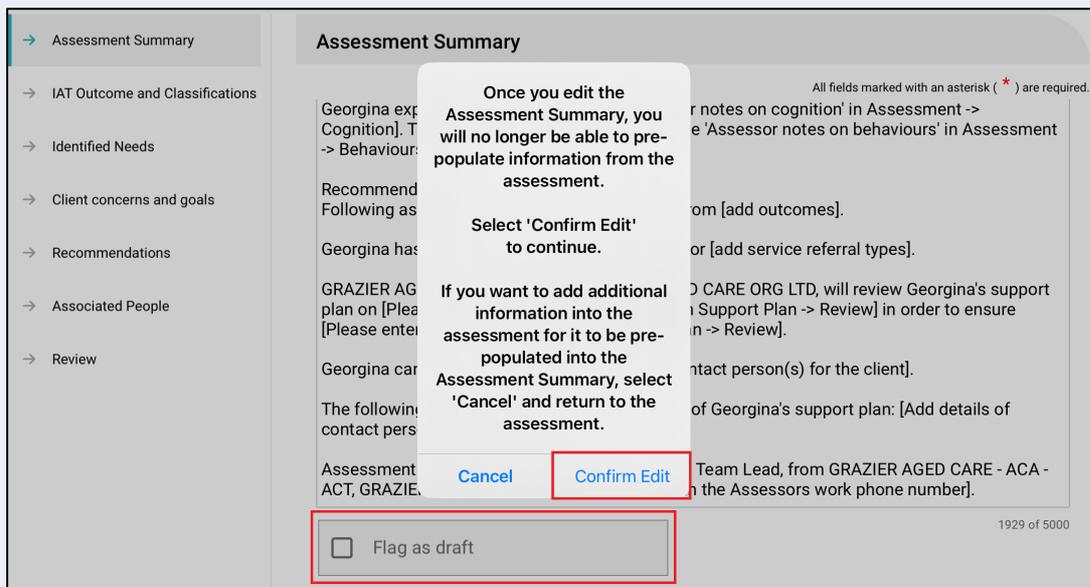
1929 of 5000

Edit

3. Select **Confirm Edit** at the pop up that appears. Note that once you start editing the assessment summary, you will no longer be able to pre-populate information from the assessment.

You will then be able to Flag as draft by the toggle function.



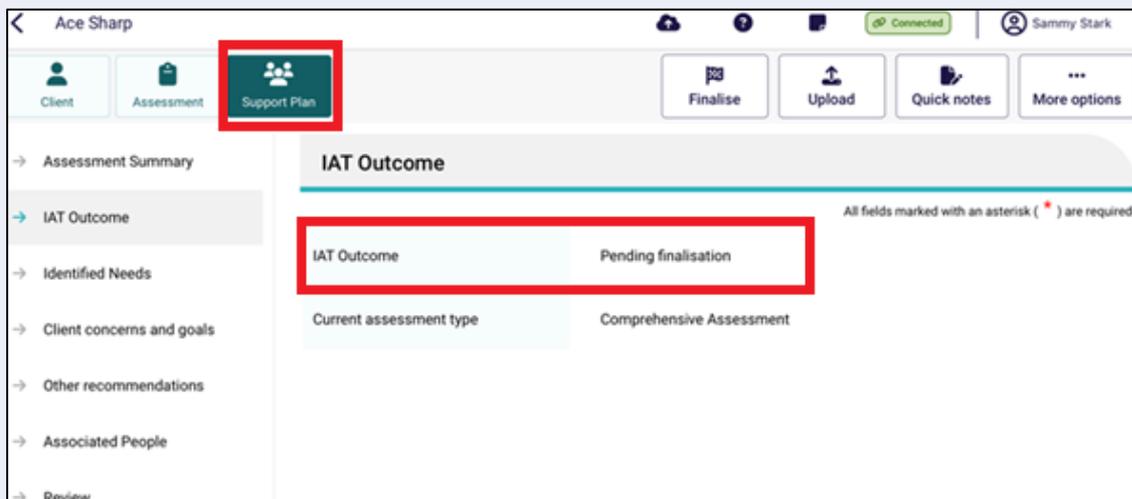


There will be a **D** icon next to the Assessment Summary menu, to remind users that the assessment summary is a draft and should be completed prior to uploading to the assessor portal.

13. IAT outcome and classifications

In the Support Plan Tab, IAT Outcome page, needs assessors can view a suggested support recommendation for the type of care the client may require. The IAT algorithm will draw on assessment responses and the client's current care approvals and recommend an Aged Care program or care pathway.

If the IAT assessment has not been finalised, then the IAT Outcome will display as **Pending finalisation**.



Once the IAT assessment has been finalised the IAT Outcome will display. You will be able to **Accept** or [Override the IAT outcome](#) by selecting the corresponding button.

! The IAT will allow an ongoing Support at Home Classification to be overridden to a different ongoing classification level. However, assessors must **not** undertake this action and delegates must not approve assessments where this occurs. An ongoing SaH classification outcome cannot be overridden to an ongoing lower or higher SaH classification outcome (in line with section 81-10 of the Aged Care Rules).

Sometimes, other buttons are available, such as **No Care Type under the Act**.

IAT Outcome and Classifications

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

IAT Outcome: SaH Classification 4

Existing Classification: No active classification

Current assessment type: Comprehensive Assessment

Recommended Classification: Pending decision

Buttons: Accept, Override, No Care Type under the Act

The below image shows an example of an overridden IAT outcome. It is stated in the Recommended Classification section. There is also an Override Reason section, and an Override reason description section.

IAT Outcome and Classifications

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

IAT Outcome: SaH Classification 4

Existing Classification: No active classification

Current assessment type: Comprehensive Assessment

Recommended Classification: SaH Restorative Care Pathway Short-term

Override reason: Does not want ongoing services

Override reason description: Reason goes here

Buttons: Edit Classification

For Home Support Assessments, you must [convert it to Comprehensive Assessment](#) before choosing to accept or [override the IAT outcome](#) given.



→ Assessment Summary

→ **IAT Outcome and Classifications**

→ Identified Needs

→ Client concerns and goals

→ Recommendations

→ Associated People

→ Review

IAT Outcome and Classifications

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

i Confirm the client's new Classification by Accepting or Overriding the IAT Outcome.

⚠ You must convert the assessment type to Comprehensive before choosing to accept or override this IAT outcome.

IAT Outcome	SaH Classification 2
	<input type="button" value="✓ Accept"/> <input type="button" value="✎ Override"/>
Existing Classification	No active classification
Current assessment type	Home Support Assessment
Recommended Classification	Pending decision

Once a **Support at Home Classification, End-Of-Life Pathway or Restorative Care Pathway** is accepted, their associated service group recommendations will be pre-populated in the **Recommendations** page.

The below image shows the Recommendations page of a client who has been assessed for the Restorative Care Pathway. This page contains a list of pre-populated Restorative Care services, grouped under service types, for the assessor to view or edit. For example, there are three services under the Domestic Assistance service type: general house cleaning, laundry services, and shopping assistance.

! For more information on the services and service types available refer to [Support at Home program | Australian Government Department of Health, Disability and Ageing](#).

You can select service/s under each service type available for the classification to **view** (eye icon) or **edit** (pencil icon).

← Izzy Raeside

Client | Assessment | **Support Plan**

Upload | Quick notes | More options

→ Assessment Summary

→ IAT Outcome and Classifications

→ Identified Needs

→ Client concerns and goals

→ **Recommendations**

→ Associated People

→ Review

Recommendations

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

+ Add a recommendation

Restorative Care

Allied health and therapy	Physiotherapy	No goals linked	<input type="button" value="👁"/>	<input type="button" value="✎"/>
	Home support care management	No goals linked	<input type="button" value="👁"/>	<input type="button" value="✎"/>
Domestic assistance	General house cleaning	No goals linked	<input type="button" value="👁"/>	<input type="button" value="✎"/>
	Laundry services	No goals linked	<input type="button" value="👁"/>	<input type="button" value="✎"/>
	Shopping assistance	No goals linked	<input type="button" value="👁"/>	<input type="button" value="✎"/>



On the **Editing [service name]** page, tick the required service/s, then enter the recommended service frequency and service intensity (eg. 2 hours per day). For some services, you can input an 'other' value.

You can also [link goals](#) here. Finally, select **Save**.

Editing Restorative Care services

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

Domestic assistance

General house cleaning Updated + 1 Goals linked

Recommended Service Frequency: 5

Recommended Service Intensity: Days per week

Laundry services Updated + No goals linked

Recommended Service Frequency: 1

Recommended Service Intensity: Other - Specify

* Recommended service intensity - Other (specify): Public holidays (15 of 100)

Shopping assistance Removed

Cancel Save

Once the desired recommendations are selected, edited and saved, the **Recommendations page** re-appears, with only the services that you have added displayed.

! Assessors must first make a **Classification recommendation**—after finalising the **Integrated Assessment Tool (IAT)** before they can add **Recommendations** to the Support Plan. This ensures that all decisions are informed by the outcomes of the IAT, maintaining consistency and accuracy in the client's care planning process. The Support Plan section will remain locked until a classification recommendation is recorded. For more information refer to the [Adding concerns, goals and recommendations](#) section.

IAT Outcome and Classifications

Confirm the client's new Classification by Accepting or Overriding the IAT Outcome

IAT Outcome: SaH Classification 5

Existing Classification: No active classification

Recommended Classification: Pending decision

Current assessment type: Comprehensive

Accept Override No Care type under the Act

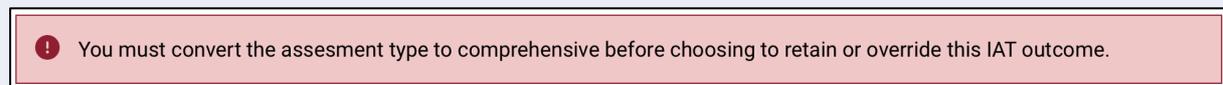
13.1 Convert to Comprehensive Assessment

If required, home support assessments can be converted to a comprehensive assessment after the IAT assessment has been finalised.

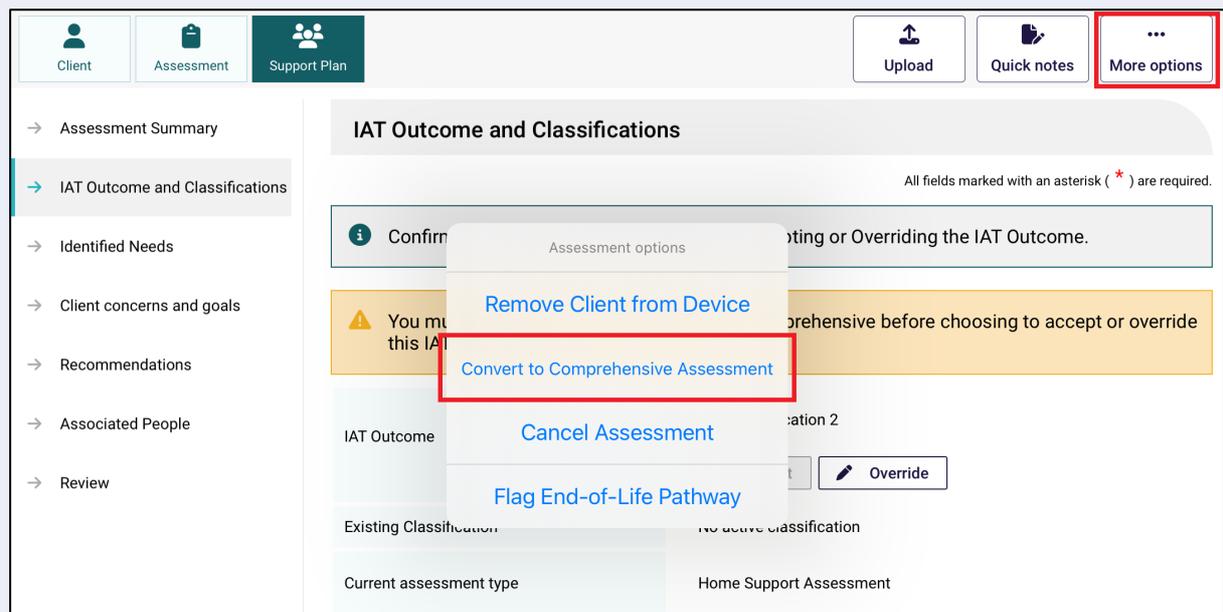
If an assessment is triaged as a home support assessment and the following service/s are recommended, the assessment will then need to be converted to a comprehensive assessment under the supervision of a staff member who holds a clinical assessor role in the My Aged Care Assessor Portal.

- Residential care
- Support At Home classification
- Restorative Care pathway
- [End-of-Life pathway](#).

In the App, a warning banner appears:



To convert, select the **More options** button followed by **Convert to Comprehensive Assessment**.



From the Convert to Compressive Assessment page, enter the reason or comments for converting the assessment. Please note the reason for change will be auto-populated to 'High level care needs'.

Put in your reason or comments, then Select **Confirm** to convert the assessment.

Convert to Comprehensive Assessment

i You are about to convert the assessment type from Home Support to Comprehensive for Georgina Smith

Assessments should only be converted if the client needs exceed the level of care than can be provided through Home Support Assessments (e.g. Home support service). Once the assessment has been converted to comprehensive assessment, you can recommend all aged care services. Please note it will not be possible to revert it back to a Home Support assessment.

Are you sure you would like to proceed?

*** Reason for change**

High level care needs

*** Reason or comments**

Want to override IAT outcome

28 of 255

Cancel

Confirm

The **IAT Outcome** tab will then display that the assessment has been converted to a Comprehensive Assessment.

Client | Assessment | **Support Plan** | Upload | Quick notes | More options

→ Assessment Summary

→ **IAT Outcome and Classifications**

→ Identified Needs

→ Client concerns and goals

→ Recommendations

→ Associated People

→ Review

IAT Outcome and Classifications

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

i Confirm the client's new Classification by Accepting or Overriding the IAT Outcome.

IAT Outcome	SaH Classification 2
	<input checked="" type="button" value="Accept"/> <input type="button" value="Override"/>
Existing Classification	No active classification
Current assessment type	Comprehensive Assessment
Recommended Classification	Pending decision
Assessment type changed by	Africa Green
Assessment type changed on	23/5/2025
Reason for change	High level care needs
Change comments	Want to override IAT outcome

13.2 Edit (Override) Recommended Classification

Assessors can edit or override a system generated IAT Outcome if they have made a mistake or if they are recommending the following:

- Support at Home Restorative Care Pathway
- Support at Home End-of-Life Pathway
- Transition Care Program
- Permanent Residential Care (without ongoing in-home services)
- Residential Respite Care (without ongoing in-home services).



For the **SaH Restorative Care Pathway (RCP)**, this can apply to both initial assessments and reassessments, and to transitioned and non-transitioned clients.

1. Select the Edit button next to the IAT outcome, or the Override button, to edit the recommended classification. This can also be done during the support plan review stage.

Edit Classification button appears when viewing an accepted IAT outcome.

The screenshot shows the 'IAT Outcome and Classifications' page. The left sidebar has a menu with 'IAT Outcome and Classifications' selected. The main content area displays the following information:

IAT Outcome	SaH Classification 2
Current assessment type	Comprehensive
Recommended Classification	SaH Classification 6
Override reason	Higher level service provision needs
Override reason description	Higher level service provision needs

An 'Edit Classification' button is highlighted with a red box next to the 'Recommended Classification' field.

Override button is available during the initial acceptance of an IAT outcome.

The screenshot shows the 'IAT Outcome and Classifications' page during the initial acceptance phase. The left sidebar has 'IAT Outcome and Classifications' selected. The main content area displays the following information:

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

Confirm the client's new Classification by Accepting or Overriding the IAT Outcome.

IAT Outcome	SaH Classification 2
Existing Classification	No active classification
Current assessment type	Comprehensive Assessment

'Accept' and 'Override' buttons are shown next to the 'IAT Outcome' field, with the 'Override' button highlighted by a red box.

2. In the next page, select the new recommended classification, override reason and the reason description, then select **Save**.

! The IAT will allow an ongoing Support at Home Classification to be overridden to a different ongoing classification level. However, assessors must **not** undertake this action and delegates must not approve assessments where this occurs. An ongoing SaH classification outcome cannot be overridden to an ongoing lower or higher SaH classification outcome (in line with section 81-10 of the Aged Care Rules).

Override IAT Outcome

All fields marked with an asterisk (*) are required

IAT Outcome SaH Classification 4

To override the result, please specify the reason for the override and describe it for the delegate.

* Override IAT outcome to
SaH Restorative Care Pathway Classification type: ShortTerm

* Override reason
Does not want ongoing services

* Override reason description
Reason goes here

16 of 150

Cancel Save

3. A confirmation pop up appears. Select **Confirm** to acknowledge that some recommendations may be removed as a result of changing classification, and this will require your recommended services to be added again.

Override IAT Outcome

All fields marked with an asterisk (*) are required

IAT Outcome SaH Classification 4

To override the result, please specify the reason for the override and describe it for the delegate.

* Override IAT outcome to
SaH Restorative Care Pathway Classification type: ShortTerm

* Override reason
Does not want ongoing services

* Override reason description
Reason goes here

16 of 150

Override Outcome
You are about to Override the algorithm generated decision. Would you like to proceed with this selection?

Cancel Confirm

Cancel Save

The Assessor will be unable to override from a SaH Classification to **SaH End of Life Pathway** if the client is not flagged as End-of-life and required documentation is not provided. In these cases, an applicable error message will be displayed. The below screenshot shows an example of an error message shown when overriding is not possible.



Edit Recommended Classification

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

❗ To be eligible for the End-of-Life Pathway, client must be flagged as End-of-Life by using the button 'FLAG CLIENT AS END-OF-LIFE' and the valid documentation must be provided.

IAT Outcome	SaH Classification 2	Classification type	Ongoing
Recommended Classification	SaH Classification 7	Classification type	Ongoing

*** New Recommended Classification**

SaH End-of-Life Pathway Classification type: ShortTerm

4. The new recommendation will display in the Recommended Classifications section of the IAT Outcome and Classifications page.

Gracen Kelly Connected | Elnaq Gibsons

Client | Assessment | **Support Plan** | Upload | Quick notes | More options

- Assessment Summary
- IAT Outcome and Classifications**
- Identified Needs
- Client concerns and goals
- Recommendations
- Associated People
- Review

IAT Outcome and Classifications

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

IAT Outcome	SaH Classification 4
Existing Classification	No active classification
Current assessment type	Comprehensive Assessment
Recommended Classification	SaH Restorative Care Pathway Short-term Edit Classification
Override reason	Does not want ongoing services
Override reason description	Reason goes here

14. Adding concerns, goals and recommendations

When developing a client's support plan in the App, Areas of Concern and Goals, and Recommendations can be added in the **Concerns and goals** and **Recommendations** section of the Support Plan.

1. To add an area of concern, select **+ Add an area of concern**.

Georgina Smith

Client Assessment Support Plan

Upload Quick notes More options

→ Assessment Summary

→ IAT Outcome and Classifications

→ Identified Needs

→ Client concerns and goals

→ Recommendations

→ Associated People

→ Review

Client concerns and goals

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

+ Add an area of concern

2. Enter in **What is the area of concern** and click **+Save**. You can add a goal at this stage by selecting the '+ Add a goal' button (refer to Steps 4 and 5), or during editing later on. Please note you will only be able to save the concern once all mandatory information has been entered.

New client concern

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

An area of concern consists of a description and goals to rectify or manage the area of concern. There can be multiple goals associated with an area of concern.

* What is the area of Concern?

Type concern here

0/500

+ Add a goal

+ Save Cancel

Select **Edit** to update or delete the area of concern or change the order of areas of concern using the arrow buttons (▲ ▼) where you have added multiple concerns. Select **X** to delete the concern.

- To add a goal to a recommendation, select **+ Add a goal** from the relevant area of concern and then select **+ Save**.

- At the **Adding A Goal** page, enter what the goal is along with other key information such as what domain the goal relates to, the client's current strengths and abilities in relation to the goal and their motivation to achieve it. At the **Recommendations** section of the page, you can select **+ Add A Recommendation**, or If the client already had recommended classifications (from the IAT Outcome and Classifications page), then these classifications will be automatically filled out, ready to be viewed (eye icon) or edited (pencil icon). Once completed select **+ Save**.

Adding a goal

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

What is the area of concern?
Feeling lonely after husband passed away

*** What is the client's goal?**
Make 3 new friends this year 28 of 500

Most relevant domain that goal area relates to?

<input type="checkbox"/> Physical function	<input type="checkbox"/> Cognitive function
<input checked="" type="checkbox"/> Social support	<input type="checkbox"/> General health
<input type="checkbox"/> Personal health	<input type="checkbox"/> Home and personal safety
<input type="checkbox"/> Other	

*** What are the client's current strengths and abilities in relation to this goal?**
Can attend community center activities

*** What are the clients current areas of difficulty or activities where the client needs support in order to achieve this goal?**
No transport 12 of 500

What support does the client's carer provide to achieve this goal?
Gives lifts sometimes 21 of 500

*** What is the focus of the goal for the client?**

<input checked="" type="checkbox"/> To regain a function (e.g. can be physical, cognitive or social)	<input type="checkbox"/> To compensate for a declining function (e.g. can be physical, cognitive or social)
<input type="checkbox"/> To receive care for a lost or declining function (e.g. can be physical, cognitive or social)	

*** Motivation to achieve**
How important is it to the client to achieve this goal?
Scale of 1 (not that important) to 10 (extremely important)

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

*** Goal status**

In Progress	Achieved	No Longer Relevant
-------------	----------	--------------------

Recommendations

+ Add a recommendation

Back Delete Save

Adding a goal

Recommendations

Assistive technology	 
Home modifications	 
Home Support (End-of-Life)	 
Home Support	 

[Back](#) [Delete](#) [Save](#)

Recommendations can also be added after the completion of the **Areas of Concern** and **Goals** in the **Recommendations** section.

Client | Assessment | **Support Plan** | Upload | Quick notes | More options

- Assessment Summary
- IAT Outcome and Classifications
- Identified Needs
- Client concerns and goals
- Recommendations**
- Associated People
- Review

Recommendations

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

[+ Add a recommendation](#)

Restorative Care

Allied health and therapy	Physiotherapy	No goals linked	 
Care management	Home support care management	No goals linked	 

5. When viewing the **Recommendations** page, assessors can view the *latest recommended Ongoing classifications*, even if the client has multiple active existing classifications within the same category. This ensures assessors have access to the most current and relevant information about the client's service needs and priority status, supporting accurate and timely decision-making for Support at Home aged care services.

Additionally, If the client was approved for a Restorative Care Pathway classification, after a Support at Home classification is approved, assessors can view both the RCP and the SaH classifications,

Assistive Technology

<p>Ongoing - Equipment and products Specified Needs - Continence Products</p>	<p>Self-care products Mobility products Managing body functions Domestic life products Communication and information management products Assistive technology prescription and clinical support</p>	<p>Goals Linked Goals Linked Goals Linked Goals Linked Goals Linked Goals Linked</p>  
<p>Short-term - Equipment and products AT Medium</p>	<p>Self-care products Mobility products Managing body functions Domestic life products Communication and information management products Assistive technology prescription and clinical support</p>	<p>Goals Linked Goals Linked Goals Linked Goals Linked Goals Linked Goals Linked</p>  

6. The corresponding recommendations available for each assessment type will display for the client in the **Recommendations** section. Recommendations that cannot be added (generally due to other recommendations that have been added) will be indicated in light grey text and any links will become inactive.

Home Support assessment:

Recommendation

Select a recommendation type

<p>General Recommendation Recommend →</p>	<p>Service Recommendation Recommend →</p>
<p>Long Term Living Arrangement Recommend →</p>	<p>Periods of Linking Support Recommend →</p>
<p>Periods of Reablement Recommend →</p>	<p>Recommendation for a Comprehensive Assessment Recommend →</p>

[Back](#)



Comprehensive assessment:

Recommendation

Select a recommendation type

General Recommendation Recommend →	Service Recommendation Recommend →
Care Type under the Act Recommend →	Home modifications Recommend →
Assistive technology Recommend →	Long Term Living Arrangement Recommend →
Periods of Linking Support Recommend →	Periods of Reablement Recommend →

Back

7. For some pathways, the recommendations will be pre-filled for the assessor to review and/or edit if necessary. Below is an example screenshot of services available under the restorative care pathway:

The screenshot shows the 'Recommendations' section for the 'Restorative Care Pathway'. The interface includes a sidebar with navigation options like 'Assessment Summary', 'IAT Outcome and Classifications', and 'Recommendations'. The main content area displays a table of services with their associated goals and editing options.

Service Category	Service	Goals	Actions
Domestic assistance	General house cleaning	No goals linked	
	Laundry services	No goals linked	
	Shopping assistance	No goals linked	
Home adjustments	Home modification products	No goals linked	
	Home modifications prescription and clinical support	Goals linked	
Home maintenance and repairs	Assistance with home maintenance and repairs	No goals linked	
	Expenses for home maintenance and repairs	No goals linked	
	Gardening	No goals linked	
Home or community general respite	Community and centre-based respite	No goals linked	
	Flexible respite	No goals linked	
Meals	Meal delivery	No goals linked	
	Meal preparation	No goals linked	

8. When available, add any service recommendations or care types under the Act. Similar to the assessor portal, [goals can be linked to some recommendations](#).

When finished, don't forget to select **Save** at the bottom of the recommendation page.



! If a client is under the aged of 65, several additional entry fields will appear to document their exceptional circumstances.

! If it is determined that a client has a high priority for a Support at Home service, you are required to answer all mandatory questions and provide your reason or comments using the available comment field.

← Connected Sheldon Cooper

Adding a Service Recommendation

Fields marked with an * are mandatory

* Service type

* Services
 Hydrotherapy Social Work
 Other Allied Health and Therapy services

* Priority

* Recommended service intensity i

* Recommended service frequency i

0/3

* Recommend a start date

* Recommend a review date

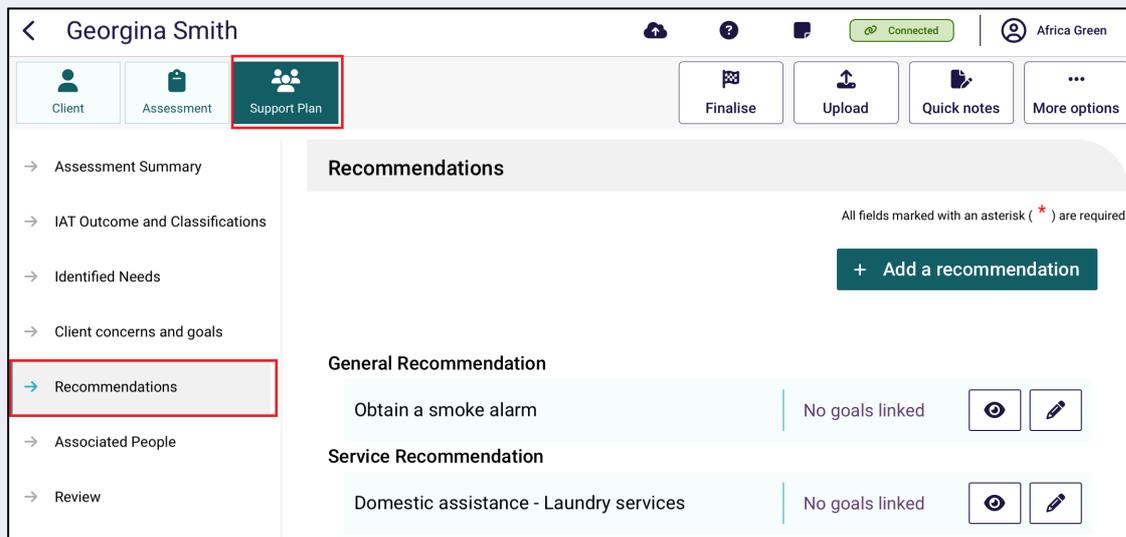
* Recommend an end date

* Responsibility to action
 Assessor Client
 Other

Comments



9. Once you have made all your recommendations, you will be able to view these in the **Recommendations** section. The **Recommendations** section will display all recommendations made during the development of the Support Plan, where the **Client concerns and goals** will only display recommendations linked to goals.



14.1 Recommendation Types

There are 8 recommendation types available from the App. Not all will be available depending on the client's assessment outcome.

If **CHSP, National ATSI Aged Care Program, or Multi-Purpose Service – Residential** is recommended, then the assessor will not be able to choose No Care Approval or No Change to Existing Care Approvals. These two selections will not be displayed.

If **No Care Type under the Act, No Change to Existing Care Approval, or No Care Approval** is recommended, then the assessor will not be able to add any service recommendations. The 'Add A Recommendation' button will be disabled.

Recommendation Type	Choices available
General Recommendation	Free choice
Service Recommendation	Allied health and therapy Assessment Case Management Client care coordination Community cottage respite Domestic assistance Equipment and products Hoarding and squalor assistance Home adjustments Home maintenance and repairs Home or community general respite Meals Multi-Purpose Service – Residential National ATSI Aged Care Program Nursing Care Personal Care



	Social support and community engagement Specialised support services Therapeutic services for independent living Transport
Care Type under the Act	(No Care Approval*) Residential Permanent Residential Respite Care Transition Care
No Care Type under the Act* No Change to Existing Care Approval* No Care Approval*	*If these recommendations were made, then the assessor will not be able to add any service recommendations. The 'Add A Recommendation' button will be disabled.
Home modifications	Home adjustments (Service available according to Short-term or Ongoing Classification, and Low, Medium or High Tier)
Assistive technology	Equipment and Products (Service available according to Short-term or Ongoing Classification, and Low, Medium or High Tier)
Long Term Living Arrangement	Hospital Independent living within a retirement village Other community Other institutional Care Private residence Residential aged care service Supported community accommodation
Period of Linking Support	N/A
Periods of Reablement	N/A

14.2 Support At Home Service Recommendations

The Support At Home Program offers services in three service groups: Assistive technology, Home modification, and Home Support.

If the client has a Support At Home (SaH) classification in their IAT Outcome and Classifications page, then all available Support At Home services that satisfies the client's classification will appear in the Recommendations page (except for [Assistive technology](#) and [Home modifications](#) which are added separately)

This table lists the Support At Home services:

Support At Home service type	Support At Home service
Care management	Home support care management
Domestic assistance	General house cleaning Laundry services Shopping assistance
Home maintenance and repairs	Assistance with home maintenance and repairs Expenses for home maintenance and repairs Gardening
Home or community general respite	Community and centre-based respite Flexible Respite
Meals	Meal delivery

	Meal preparation
Nursing care	Enrolled nurse clinical care Nursing assistance clinical care Nursing care consumables Registered nurse clinical care
Nutrition	Nutrition supports
Personal care	Assistance with self-administration of medications Assistance with self-care and activities of daily living Continence management (non-clinical)
Social support and community engagement	Accompanied activities Assistance to maintain personal affairs Cultural support Digital education and support Expenses to maintain personal affairs Group social support Individual social support
Transport	Direct transport Indirect transport

The below image shows some Home Support recommendations in the Recommendations page. Select the **View** (eye) button next to any one of these services, to view all services. Select the **Edit** (pencil) button next to any one of these services, to edit any available service.

The screenshot shows a software interface for managing support plans. The top navigation bar includes 'Client', 'Assessment', and 'Support Plan' tabs, along with 'Upload', 'Quick notes', and 'More options' buttons. The left sidebar contains a menu with items like 'Assessment Summary', 'IAT Outcome and Classifications', 'Identified Needs', 'Client concerns and goals', 'Recommendations', 'Seeking services', 'Associated People', and 'Review'. The main content area is titled 'Recommendations' and features a '+ Add a recommendation' button. Below this, a section titled 'Home Support' contains a table of services. A red box highlights a specific service row: 'Home support care management' under the 'Care management' category. This row has 'No goals linked' and two icons: an eye (View) and a pencil (Edit). Other services listed include 'Domestic assistance' (General house cleaning, Laundry services, Shopping assistance), 'Home maintenance and repairs' (Assistance with home maintenance and repairs, Expenses for home maintenance and repairs, Gardening), and 'Home or community general respite' (Community and centre-based respite, Flexible respite). A message box at the top of the Home Support section states: 'Confirm the Home Support service frequency and intensity prior to submitting for delegate approval.'

To successfully submit the Home Support recommendation for delegate approval, each service that the client will use will need to be fully completed, including service frequency and intensity.

To input service frequency and intensity, select any **Edit** button to open the **Editing Home Support Services** page.

The screenshot shows the 'Editing Home Support services' page. At the top, it says 'Editing Home Support services' and 'All fields marked with an asterisk (*) are required'. Under the heading 'Therapeutic services for independent living', there are five service items, each with an unchecked checkbox: 'Art therapy', 'Remedial massage', 'Diversional therapy', 'Chiropractics', and 'Acupuncture'. At the bottom right, there are 'Cancel' and 'Save' buttons.

Scroll down to the desired service.

Firstly, go to **Recommended Service Intensity** and select a suitable value from the drop down menu provided, then select **Done**.

The screenshot shows the 'Editing Home Support services' page for the 'Meals' section. It lists two services: 'Meal delivery' and 'Meal preparation', both with checked checkboxes. For 'Meal delivery', there is an 'Added' button, a '+ No goals linked' button, and a 'Recommended Service Intensity' dropdown menu set to 'Days per week'. A red box highlights this dropdown. Below the services, there are labels for 'Recommended Service Frequency' and 'Recommended Service Intensity'. At the bottom, a dropdown menu is open, showing options: 'Time(s) per hour', 'Time(s) per day', 'Days per week' (highlighted with a red box), 'Days per month', and 'Time(s) per year'. A 'Done' button is visible on the right side of the dropdown menu.

The available service intensities are:

- Time(s) per hour
- Time(s) per day
- Days per week
- Time(s) per year
- Hours per day
- Hours per week
- Hour(s) per year.

Then, input a suitable number in the **Recommended Service Frequency** section. For example, if the Recommended Service Intensity is Days per week, then the Recommended Service Frequency can only be a number from 1 to 7.

Once all values are properly entered, the red vertical line against each service will disappear, leaving a grey vertical line instead.

Recommended Service Frequency <input type="text" value="5"/>	Recommended Service Intensity <input type="text" value="Days per week"/>
--	--

If you have a non-standard service intensity, Select **Other – Specify** in the **Recommended Service Intensity** section. Then, enter the service intensity in the **Recommended service intensity – Other (specify)** section that will appear on the right of the screen. Finally, enter the **Recommended service frequency**.

Editing Home Support services

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

<input checked="" type="checkbox"/> Meal delivery	Added	+ No goals linked
Recommended Service Frequency <input type="text" value="5"/>	Recommended Service Intensity <input type="text" value="Days per week"/>	
<input checked="" type="checkbox"/> Meal preparation	Added	+ No goals linked
Recommended Service Frequency <input type="text"/>	Recommended Service Intensity <input type="text" value="Other - Specify"/>	* Recommended service intensity - Other (specify) <input type="text"/>
<input type="button" value="Done"/>		
Hours per week Hours per month Hour(s) per year <input type="text" value="Other - Specify"/>		



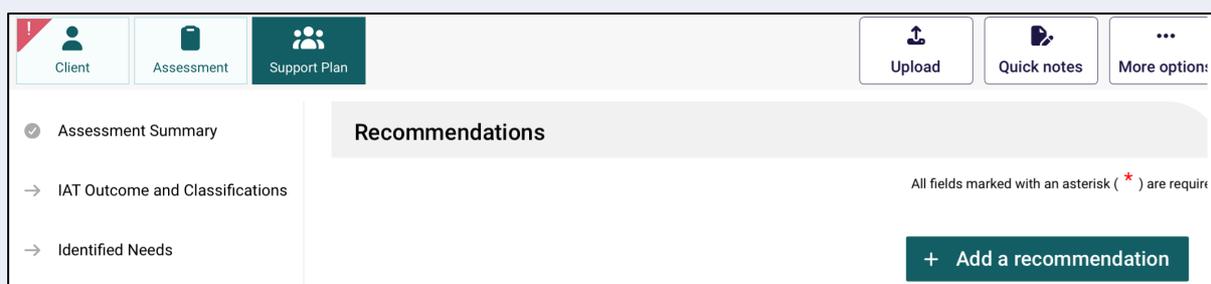
14.2.1 Adding an Assistive technology (AT) recommendation

When an Assistive technology recommendation is approved, it is also known as a Support At Home AT Classification.

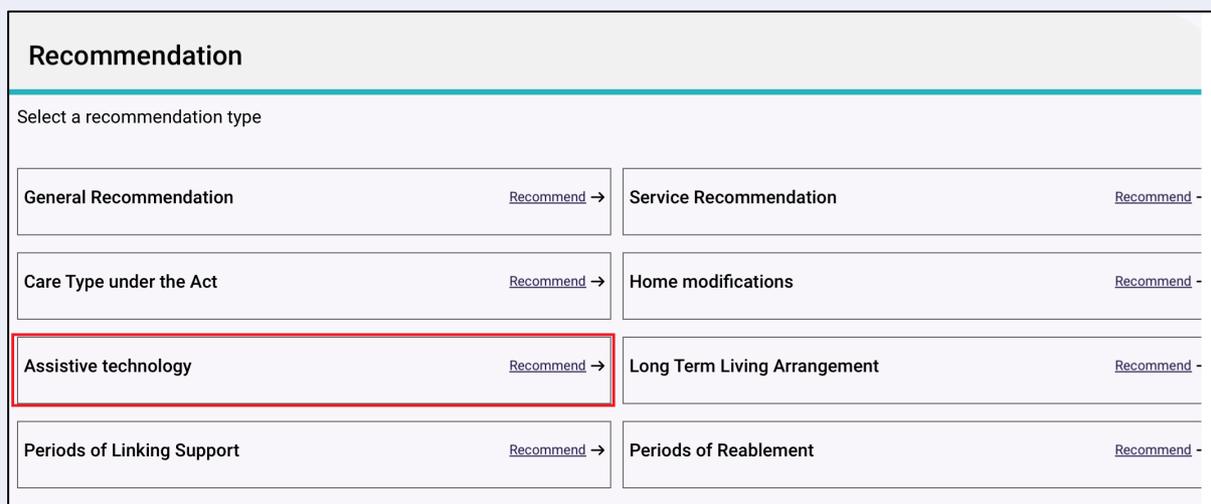
Please note that Assistance dogs are classified under the Ongoing classification type of assistive technology. It is known as 'Specified Needs – Assistance Dogs'.

Follow these steps to add an AT recommendation:

1. Go to the Support Plan tab, then the Recommendations page. Select **+ Add A Recommendation**.



2. Select **Assistive Technology** from the list of recommendation types.



Recommendation	
Select a recommendation type	
General Recommendation Recommend →	Service Recommendation Recommend -
Care Type under the Act Recommend →	Home modifications Recommend -
Assistive technology Recommend →	Long Term Living Arrangement Recommend -
Periods of Linking Support Recommend →	Periods of Reablement Recommend -

3. The **Adding Assistive Technology service** page appears.

Select the **Classification Type** (Ongoing or Short-term) from the drop down menu that appears.

If the classification type is Short-term, select the technology tier (AT Low, AT Medium, or AT High) from the drop-down list. If it is Ongoing, assistance dogs is available under the Specified Needs section. An example of each type is displayed below.

A number of services associated with the recommendation will be able for you to choose or delete. These services appear based on your answer and the outcome of your client's assessment, such as tier, specified needs, and service type.

Select service/s using the tickbox/es. At this stage you can also [link goals to each service](#) by selecting the 'No goals linked' button.

AT Short Term Classification Example

← ? Connected Sheldon Cooper

Adding Assistive Technology service

Fields marked with an * are mandatory

* **Classification type**
Short-term

* **Assistive Technology Tier**
AT Medium

* **Service type**
Equipment and Products

* **Services**

<input checked="" type="checkbox"/> Self-care products	No goals linked
<input checked="" type="checkbox"/> Mobility products	No goals linked
<input checked="" type="checkbox"/> Managing body functions	No goals linked
<input checked="" type="checkbox"/> Domestic life products	No goals linked
<input checked="" type="checkbox"/> Communication and Information management products	No goals linked

Cancel Delete Save

AT Ongoing Assistance Dogs example

← ? Connected Elnaq Gibsone

Adding Assistive technology service

All fields marked with an asterisk (*) are required

* **Classification type**
Ongoing

Specified needs
Specified needs - Assistance Dogs

Service type
Equipment and products

Services

<input checked="" type="checkbox"/> Assistive technology prescription and clinical support	+ No goals linked
<input checked="" type="checkbox"/> Communication and information management products	+ No goals linked
<input checked="" type="checkbox"/> Managing body functions	+ No goals linked

Cancel Save



4. Select **Save** to return to the **IAT Outcome and Classification** page.

Your service/s will be added to the Recommendations tab under the Assistive technology section. You can view the services in more detail using the View (eye) icon, or edit the services using the Pencil icon.

The screenshot shows the 'Recommendations' page in the 'Support Plan' tab. The sidebar on the left includes 'Assessment Summary', 'IAT Outcome and Classifications', 'Identified Needs', 'Client concerns and goals', 'Recommendations' (highlighted), 'Seeking services', 'Associated People', and 'Review'. The main content area is titled 'Recommendations' and features a '+ Add a recommendation' button. Below this is a section for 'Assistive technology' with a table of services and their goal status:

Service	Goal Status
Assistive technology prescription and clinical support	No goals linked
Communication and information management products	No goals linked
Domestic life products	No goals linked
Managing body functions	No goals linked
Mobility products	No goals linked
Self-care products	No goals linked

Short-term - Equipment and products AT Low

14.2.2 Adding a Home modifications (HM) recommendation

When a Home modifications recommendation is approved, it is also known as a Support At Home HM Classification.

Follow these steps to add a HM recommendation:

1. Go to the Support Plan tab, then the Recommendations page. Select **+ Add A Recommendation**.

This screenshot shows the 'Recommendations' page with the '+ Add a recommendation' button highlighted in a green box. The sidebar and main content area are the same as in the previous screenshot.

2. Select **Home modifications** from the list of recommendation types.

The screenshot shows the 'Recommendation' selection screen. It features a table with the following recommendation types:

Recommendation	
Select a recommendation type	
General Recommendation Recommend →	Service Recommendation Recommend →
Care Type under the Act Recommend →	Home modifications Recommend →
Assistive technology Recommend →	Long Term Living Arrangement Recommend →
Periods of Linking Support Recommend →	Periods of Reablement Recommend →

3. The **Adding Home modifications service** page appears.

The **Classification Type** (Ongoing or Short-term) is pre-filled.

Select the **Home modifications Tier** (HM Low, HM Medium, or HM High) from the drop down menu that appears.

Select service/s using the tickbox/es. At this stage you can also [link goals to each service](#) by selecting the 'No goals linked' button.

The screenshot shows a form titled "Adding Home modifications service". At the top right, it says "All fields marked with an asterisk (*) are required". The form has several sections: "Classification type" with a dropdown menu set to "Short-term"; "* Home modifications Tier" with a dropdown menu set to "HM High"; "Service type" with a dropdown menu set to "Home adjustments"; and "Services" with two items: "Home modifications prescription and clinical support" and "Home modification products", both with checked checkboxes. To the right of each service is a button that says "+ No goals linked". At the bottom of the form are "Cancel" and "Save" buttons.

4. Select **Save** to return to the **IAT Outcome and Classification** page.

Your service/s will be added to the Recommendations tab under the **Home modification** section. You can view the services in more detail using the View (eye) icon, or edit the services using the Pencil icon.

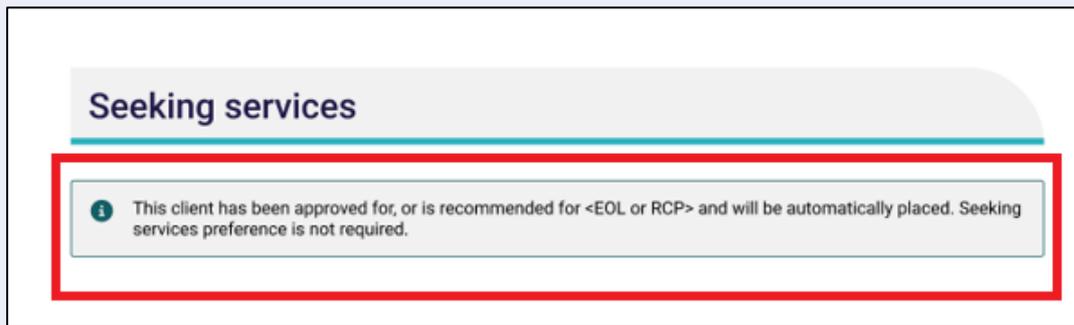
The screenshot shows the "Other Recommendations" page in a web application. The top navigation bar includes a back arrow, a "Connected" status, and the user name "Sheldon Cooper". Below the navigation bar are several tabs: "Client", "Assessment", and "Support Plan". The "Support Plan" tab is active. The main content area is titled "Other Recommendations" and has a "+ Add a recommendation" button. Below this is a section for "Home modification" with two items: "Short term - Home Adjustments HM Medium" and "Home modification products Home modification prescription and clinical support". Each item has a "Goals Linked" label and icons for viewing (eye) and editing (pencil).

14.3 Adding Seeking Services Preferences

Assessors can use the App to indicate whether their client are seeking Home Support services and/or Home modification and/or Assistive technology services through the Support At Home program.

This function is for clients recommended or approved for Support at Home (SaH), Assistive Technology (AT), and Home Modifications (HM) only.

If the client is approved or recommended for the End of Life Pathway or the Restorative Care Pathway, a message will display indicating that the client will be automatically placed and no Seeking Services preference is required.



Follow these steps to add seeking services:

1. Open the Client's assessment record and navigate to the support plan section.



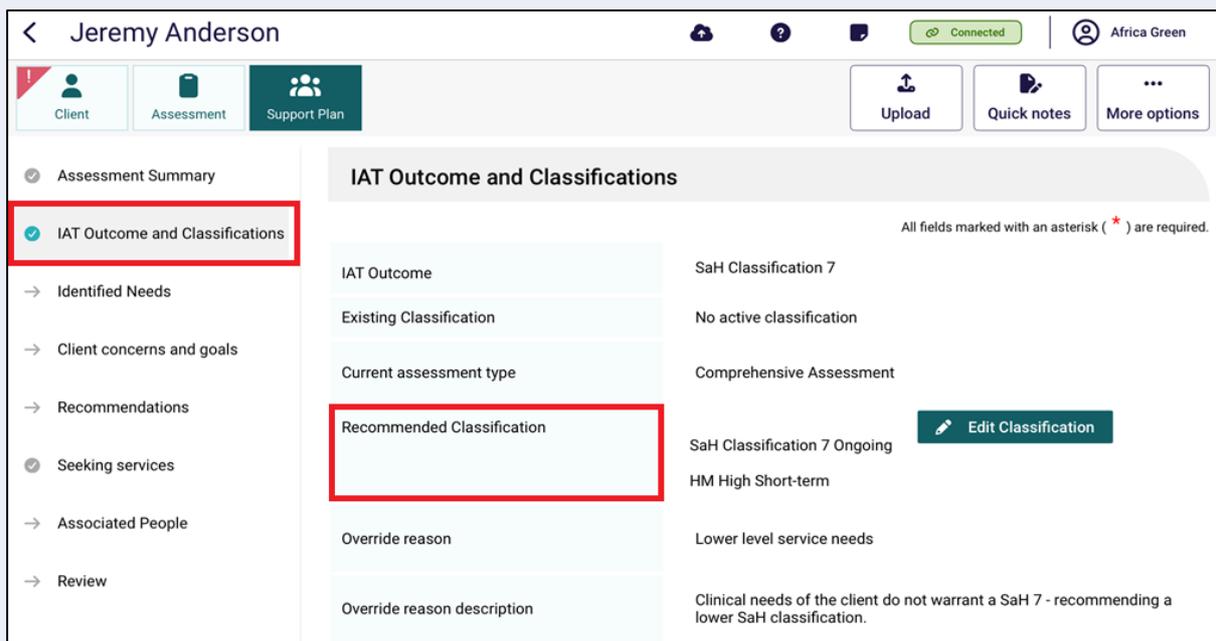
2. Check if the client is eligible to add seeking services, by going to the **IAT Outcome and Classifications** page.

Seeking Services preferences will only be available if the client has:

- An **Approved Classification** from a prior assessment, or
- A **Recommended Classification** in the current assessment.

Eligible classifications include:

- **Support at Home (SaH)**
- **Assistive Technology (AT)**
- **Home Modifications (HM)**



3. If the client is eligible, go to the **Seeking Services** page.

Depending on the client's classification, only the relevant service section (e.g., Support at



Home, Assistive Technology, or Home Modifications) will be visible.

If no eligible classifications are present, this section will be hidden and display: *“There are no preferences for Seeking services at this time.”*

If the client wants to seek services, toggle **Seeking services** under the relevant service’s heading.

Jeremy Anderson

Client Assessment Support Plan

Upload Quick notes More options

Assessment Summary

IAT Outcome and Classifications

Identified Needs

Client concerns and goals

Recommendations

Seeking services

Associated People

Review

Seeking services

All fields marked with an asterisk (*) are required

Support at Home

* Is the client seeking Home support services through the Support at Home program?

Seeking services Not seeking services

Home modifications

* Is the client seeking Home modifications services through the Support at Home program?

Seeking services Not seeking services

If **Not seeking services** is selected, assessors must choose a reason from a dropdown. If **Other. Please specify** or **Deceased** is selected, a text box will appear for further details.

Jeremy Anderson

Client Assessment Support Plan

Upload Quick notes More options

Assessment Summary

IAT Outcome and Classifications

Identified Needs

Client concerns and goals

Recommendations

Seeking services

Associated People

Seeking services

All fields marked with an asterisk (*) are required

Support at Home

* Is the client seeking Home support services through the Support at Home program?

Seeking services Not seeking services

* What is the reason for not seeking Home support services preference?

Other. Please Specify

* Please specify other reason

0 of 100

Done

Does not want Restorative Care

Did Not Wish to Specify

Returned Mail

Other. Please Specify

4. For each visible sub-section, all compulsory fields must be filled out. When the page is complete, there will be a green tick next to the Seeking Services page on the side menu. You can then navigate to another section of the app.

Seeking services



14.4 Editing a Goal

You can edit a goal before uploading an assessment, support plan or during a support plan review if the recommendation is not already in place with a provider.

1. Go to the support plan and then go to the **Client concerns and goals** page. Expand the concern listing, and select the **Edit** (pencil) icon on the right of the desired goal.

The screenshot shows the 'Client concerns and goals' page. The 'Support Plan' tab is selected in the top navigation. The left sidebar has 'Client concerns and goals' highlighted. The main content area shows 'Concern 1' with '2 Goals' and 'Concern 2' with '1 Goal'. The goal 'Goal 2a' is expanded, showing 'Strengths and abilities', 'Areas of difficulty', and 'Motivation' (score 5). The 'Edit' (pencil) icon for 'Goal 2a' is highlighted with a red box.

Alternatively, select the Edit icon to the right of the Concern.

The screenshot shows the 'Client concerns and goals' page. The 'Support Plan' tab is selected in the top navigation. The left sidebar has 'Client concerns and goals' highlighted. The main content area shows 'Concern 1' with '2 Goals', 'Concern 2' with '1 Goal', and 'Concern 3' with '1 Goal'. The 'Edit' icon for 'Concern 1' is highlighted with a red box.

The **Editing a client concern** page appears. Expand the goal listing, and select the **Edit** (pencil) icon on the right of the desired goal.

Editing a client concern

An area of concern consists of a description and goals to rectify or manage the area of concern. There can be multiple goals associated with an area of concern.

* What is the area of Concern?

Concern 1 9 of 500

+ Add another goal

^ 2 Goals

Goal 1b			In progress
Strengths and abilities	Areas of difficulty	Motivation	
Sample text	Sample text	10	

Goal 1a			In progress
Strengths and abilities	Areas of difficulty	Motivation	
Sample text	Sample text	8	

2. The **Editing A Goal** page appears.

Make sure all the mandatory fields are complete. These include:

- What is the client's goal?
- What are the client's current strengths and abilities in relation to this goal?
- What are the client's current areas of difficulty or activities where the client needs support in order to achieve this goal?
- What is the focus of the goal for the client? (To regain a function, To receive care for a lost or declining function, or To compensate for a declining function)
- Motivation to achieve (Scale of 1 to 10)
- Goal status (In progress, Achieved, or No Longer Relevant)

3. Link goals to a recommendation. This is done at the **Recommendations** section of the **Editing a Goal** page.

Select the **Edit** (pencil) icon next to the pre-filled recommendation if this exists. The Pre-filled recommendation comes from the client's **Recommended Classification** from the **IAT Outcome and Classifications** page.

Alternatively, select the **+ Add a Recommendation** button at the bottom right of the page to add a recommendation that will be linked to this goal.

! Always edit the pre-filled recommendations first if it is available.

4. Finally, select **Save** at the bottom of the page.

14.5 Linking Goals to Recommendations

Clients with Recommended Classifications

If the client has a [Recommended Classification](#) in the IAT Outcome and Classifications page, then this classification will appear as a pre-filled recommendation, in the **Editing A Goal** page.

To Link Goals, ensure that there are [goals available to edit](#).

1. From the [Editing A Goal](#) page, select the **Edit** (Pencil) icon to the right of the pre-filled recommendation.

Editing a goal

* Goal status

In Progress Achieved No Longer Relevant

Recommendations

Home Support (End-of-Life)

+ Add a recommendation

Back Delete Save

2. The **Editing [Recommended Classification] services** page will appear. Using Home Support services as an example, scroll down to the desired service. [Ensure that the Recommended Service Intensity and Recommended Service Frequency are filled out](#) before selecting **+ No goals linked**. Otherwise, goals will not be linkable.

Editing Home Support services

All fields marked with an asterisk (*) are required

Transport

Direct transport + No goals linked

Recommended Service Frequency Recommended Service Intensity

Indirect transport + No goals linked

Recommended Service Frequency Recommended Service Intensity

Done

Time(s) per hour
Time(s) per day
Days per week

- After selecting **+ No goals linked**, the **Link Goals to [Service]** page appears.
Select the concern/s that fit the goal, then select **Select**.

Link Goals to Direct transport

Concern 1

Goal 1b

Goal 1a

Concern 2

Join the Bridge club

Concern 3

Goal 3a

- Now the service has 1 goal linked and has an Updated status.
Repeat the above steps to link the same goal to another service if required.
Then, Select **Save**.

Editing Home Support services

All fields marked with an asterisk (*) are required

Transport

Direct transport Updated + 1 Goals linked

Recommended Service Frequency **Recommended Service Intensity**

Indirect transport + No goals linked

Recommended Service Frequency **Recommended Service Intensity**

Personal care

Assistance with self-care and activities of daily living + No goals linked

- The **Editing A Goal** page now shows the linked goal underneath the pre-filled recommendations heading.
You can now link more goals to the pre-filled recommendations, or select **+ Add a recommendation** for other types of recommendations.
Finally, select **Save**.



Editing a goal

* Goal status

In Progress | Achieved | No Longer Relevant

Recommendations

Home Support (End-of-Life) 👁️ ✎

Transport - Direct transport

+ Add a recommendation

Back Delete Save

6. The **Recommendations** page now shows your goals linked to the recommendation or service.

Client

Assessment

Support Plan

Upload

Quick notes

More options

- ✓ Assessment Summary
- IAT Outcome and Classifications
- Identified Needs
- Client concerns and goals
- Recommendations
- Associated People
- Review

Recommendations

All fields marked with an asterisk (*) are required

Support and community engagement	Digital education and support	No goals linked	👁️ ✎
	Expenses to maintain personal affairs	No goals linked	
	Group social support	No goals linked	
	Individual social support	No goals linked	
Therapeutic services for independent living	Chiropractics	No goals linked	👁️ ✎
	Direct transport	Goals linked	
Transport	Indirect transport	No goals linked	👁️ ✎

Clients without Recommended Classifications

To Link Goals, ensure that there are [goals available to edit](#).

Clients that do not have any Recommended Classifications or pre-filled Recommendations will have their Editing A Goal page looking like the screenshot below.

1. From the **Editing A Goal** page, select **+ Add a recommendation**

Editing a goal

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

* Goal status

In Progress	Achieved	No Longer Relevant
-------------	----------	--------------------

Recommendations

+ Add a recommendation

Back
Delete
Save

- The **Recommendation** page appears. Select the recommendation.

Recommendation

Select a recommendation type

General Recommendation Recommend →	Service Recommendation Recommend →
Care Type under the Act Recommend →	Assistive technology Recommend →
Periods of Linking Support Recommend →	Periods of Reablement Recommend →

Ensure there is no duplication of recommendations or services, or a warning message will be displayed.

 There is already a classification under the same category

- Ensure that all compulsory fields are filled out and then select **Save**.
Note that this goal is already associated with the recommendation.

Adding a Care Type under the Act

All fields marked with an asterisk (*) are required

If time-limited, when does the approval stop: ⓘ

31/01/2026

* What is the urgency of this care type? ⓘ

High

Medium

Low

* Is this emergency care?

Yes

No

Reason or comments

Maximum 255 characters

0 of 255

Associated goals

Goal A

Save

Cancel

- You will be taken back to the **Editing A Goal** page.

Any of your linked recommendations will display under the Recommendations heading, and then underneath each recommendation's sub-heading.

At this point you can **View** these recommendations again, **Edit** them, or add another recommendation altogether by selecting **+ Add a recommendation**.

Finally, select **Save**.

Editing a goal

Recommendations

General Recommendation

Buy a personal alarm



Care Type under the Act

Residential Permanent



+ Add a recommendation

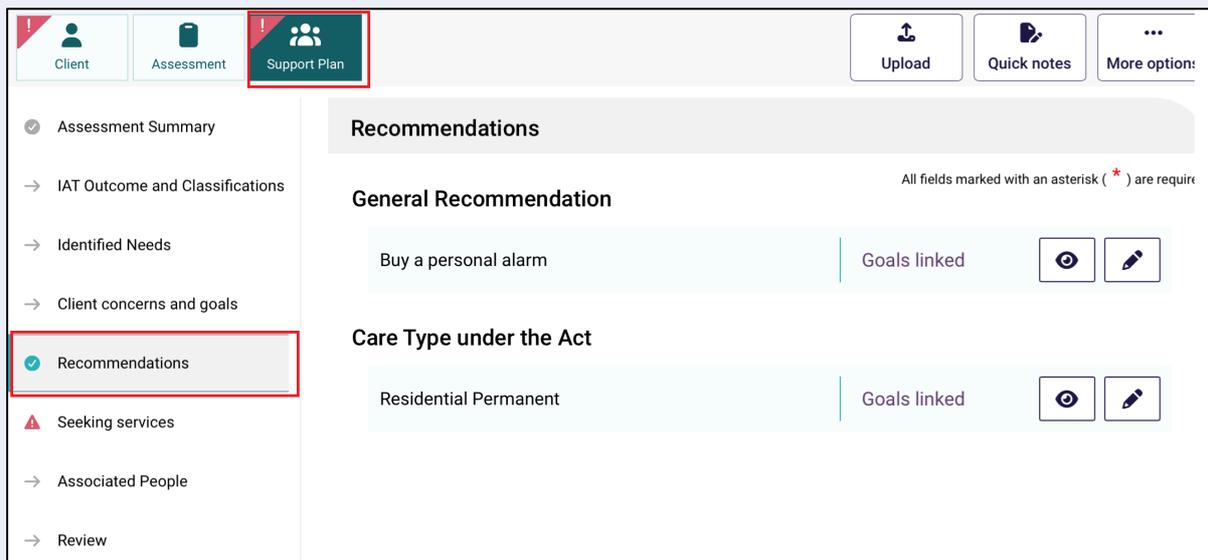
Back

Delete

Save

- The **Recommendations** page now shows your goals linked to the recommendation or service.





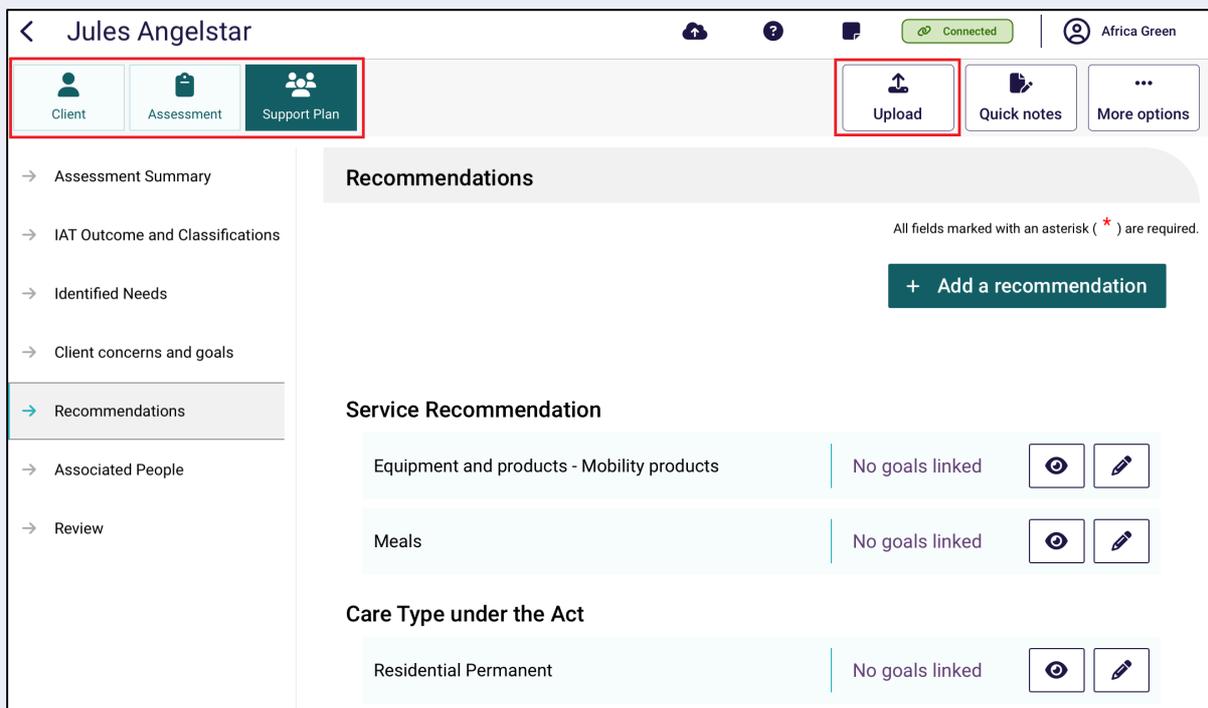
15. Uploading assessment and support plan information to the assessor portal

! The device must be connected to the internet to upload an assessment.

15.1 Uploading assessment and support plan information for downloaded assessments

To upload assessment and support plan information for a client whose referral you have downloaded and assessment you have undertaken on the App, follow the steps below.

1. For the assessment you wish to upload, select **Upload** from either the **Client**, **Assessment** or **Support Plan** sections.



! If not connected, the **Upload** button will not be available.

Client Assessment Support Plan

Quick notes More options

Assessment Summary

IAT Outcome and Classifications

Identified Needs

Recommendations

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

+ Add a recommendation

The **Upload Assessment** page will display. Address any incomplete sections if required by selecting **Cancel** and uploading again at a later time.

Upload assessment

Was this assessment conducted in a remote setting?

i A remote assessment is an assessment conducted in a remote or very remote area of Australia. This is when an assessment is conducted in either a MMM6 or MMM7 geographical area as defined by the Modified Monash Model (MMM). You can check the MMM classification of a location on the doctorconnect website.

! **Assessment is incomplete**
There are outstanding questions in the assessment for Referral Incoming
Section: Triage

- o How long has the client experienced this circumstance?
- o Are you currently receiving any aged care services?
- o Are you able to walk?
- o What type of assessor is recommended for client assessment?
- o Require an urgent assessment?
- o Priority of assessment

i Are you sure you would like to upload this assessment
You will no longer be able to make changes to the assessment after uploading it. You may still review the assessment on the device for 7 days from the time of upload.

Cancel Upload

! **Incomplete or invalid questions will not prevent you from uploading the assessment.** However, you will need to complete all mandatory questions before you can complete the assessment in the assessor portal.

You will not be able to upload the assessment if the Assessment summary exceeds 5,000 characters.

2. If your face-to-face assessment was conducted in a remote location, you should ensure that the **Remote Assessment** indicator is selected before the assessment is uploaded. To determine if an assessment is conducted in a remote location, please review the information provided within the help icon.

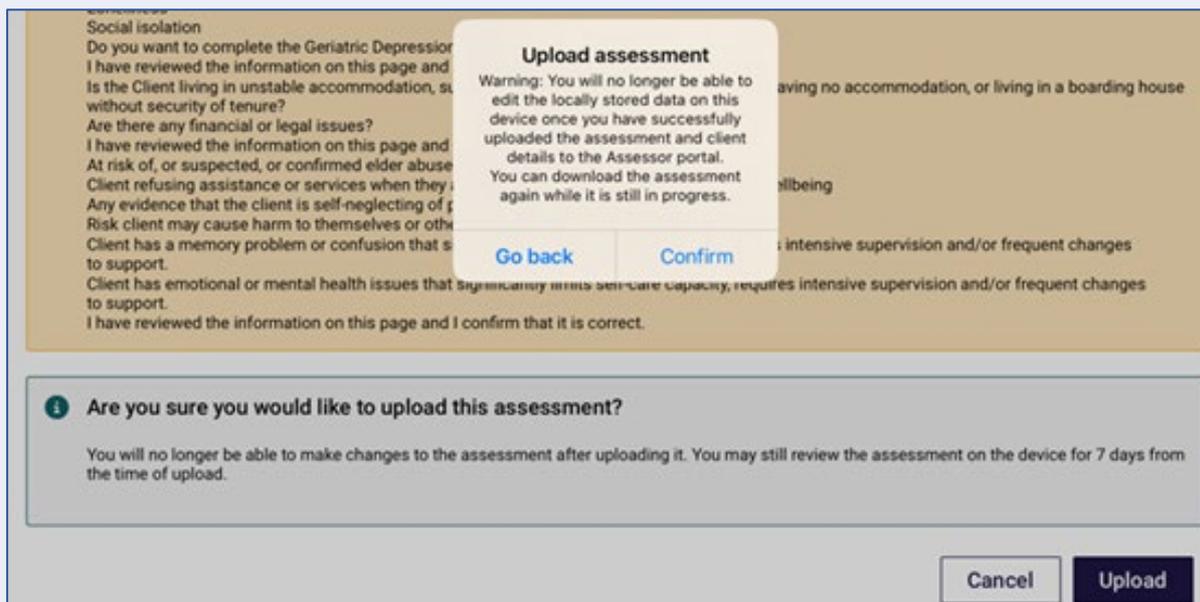
Was this assessment conducted in a remote setting?

i A remote assessment is an assessment conducted in a remote or very remote area of Australia. This is when an assessment is conducted in either a MMM6 or MMM7 geographical area as defined by the Modified Monash Model (MMM). You can check the MMM classification of a location on the doctorconnect website.

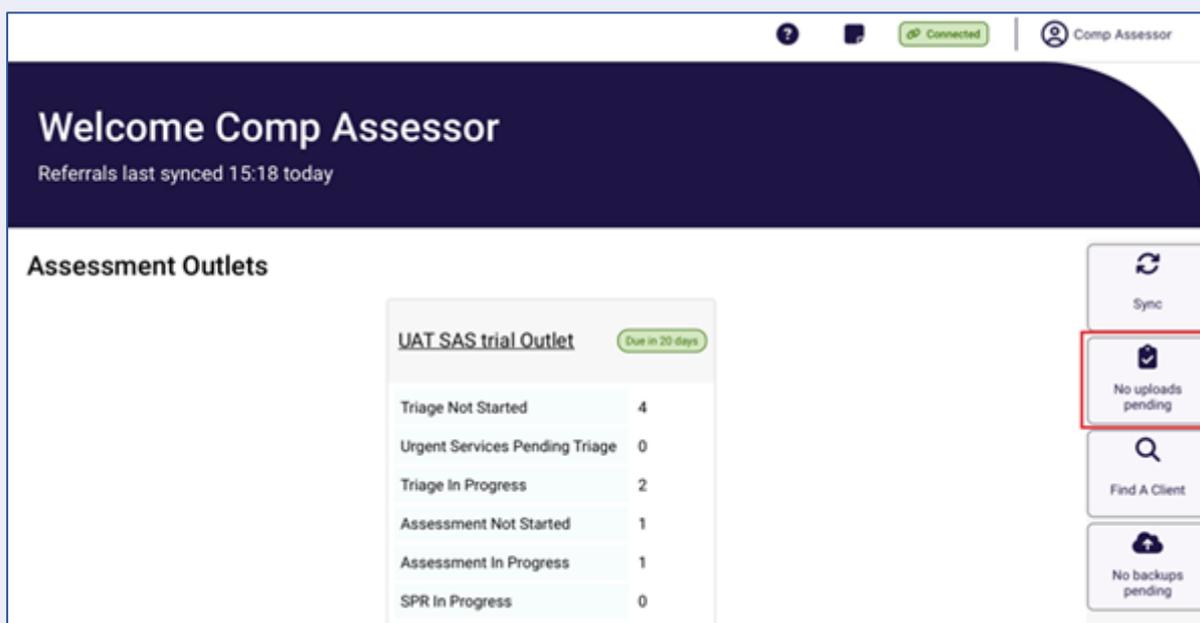
Cancel Upload



3. Select **Upload**, and then select **Confirm** in the pop-up window.



4. The assessment will now be uploaded to the My Aged Care assessor portal. The information you added as part of the assessment will automatically populate the corresponding fields, where applicable, in the assessor portal and will display as **Pending Uploads** on the Dashboard in the App.



5. Once you have uploaded the client's information to the assessor portal, you can remove the client locally from your device. From now on, the client's referral and assessment is only viewable through the portal. The only way to interact with the client record using the App is to download the client's referral again.

15.2 Uploading assessments for offline clients

To upload assessment information for offline clients' assessments created on the App when not connected to the internet, the offline client will need to be registered locally or linked to an existing client record.

Following the client's registration, needs assessors can [self-refer clients for assessment](#) before uploading the assessment.



! If the client already has an in-progress assessment, you will not be able to upload the assessment. This should be confirmed prior to starting the assessment for an offline client.

For more information regarding this process please refer to the [My Aged Care – Assessor Portal User Guide 1 – Registering and referring clients](#).

15.3 Locally registering an offline client

If you do not have a referral assigned to you for an offline client saved locally to your device, you will need to register the client and arrange for a referral to be issued and assigned to you. This process can **only** be done when connected to the internet.

! If you have a referral assigned to you for the offline client you wish to upload to the assessor portal, follow the steps in [Linking offline clients and assessments](#).

Once the offline client has been registered and a referral has been assigned to you in the assessor portal, you can link the offline client to the assessment referral and upload the assessment to the assessor portal.

Follow the steps below to locally register an Offline client.

1. Select the Offline client that you wish to register from your Dashboard.

The screenshot shows the 'Dashboard' page of the Assessor Portal. At the top, there is a navigation bar with a back arrow, a help icon, a 'Not connected' status indicator, and a 'Comp Assessor' profile icon. Below the navigation bar, there is a filter section showing '5 assessments, sorted by Client Last Name'. The main content area displays a grid of client cards. Each card shows the client's name, a 'Self referral' button, a 'Triage not started' button, and a priority indicator (e.g., 'Medium priority', 'High priority', 'Low priority'). Below the buttons, there are fields for 'Aged Care ID', 'Assessment type' (e.g., 'Comprehensive'), and 'First Clinical' (e.g., '19 days overdue'). The card for 'Harry Miller' is highlighted with a red border, and a 'More options' menu is open to its right, showing 'Sync', 'New Assessment', and 'Backup Assessment' options.

2. Select **More options**, then **Register Client** at the pop up.

Harry Miller

Client Assessment Support Plan

Complete Triage Quick notes More options

Client Profile

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

Estimated Age *
85

Gender *
Male

Country of
Australia

Ethnicity *
African

Does the client identify as an *
No - Neither

Preferred language *
English

Assessment options

Remove Client from Device

Register Client

Add to Existing Client

3. The App will do a real-time check for any potential duplicates. Select **View Potential Matches** to view the possible matching client records.

If there are no matches, select **Register** and proceed to step 5.

! If there are any potential duplicate matches found, you will be required to view these records prior to registering the new client to avoid creating a duplicate client record in My Aged Care.

! 2 potential duplicate matches were found

View Potential Matches

Register

The list of potential duplicate matches will be displayed on the left side of the screen in list view. Select each record to see a visual comparison of client details against the client record being registered.

< Register a client

Review potential duplicate client

Client details

→ Harry Miller	First name	Harry	Harry
→ Harry Miller	Middle name		
	Last name	Miller	Miller
	Date of Birth	01/07/1938	01/07/1938
	Home phone		
	Address	Level 1, 260 ELIZABETH Street SURRY HILLS NSW 2010	
	Mobile phone		(Not Applicable)
	Email		
	Medicare		
	DVA No		
	CRN		
	ACMPS		

Use new record Use existing record

If none of the potential duplicate matches are the client you are registering, select **Use new record** to complete the registration process: you will need to indicate client consent to register prior.

If you wish to use the matching record, select **Use existing record**.

- Where any client demographic information conflicts between the two records being merged, you must select which information to retain before saving.

The **Online record** is the record that already exists in My Aged Care, and **Captured offline** is the offline client saved locally to your device.

< Harry Miller ? Connected Comp Assessor

Resolve client record conflicts

* The below client information has been identified as conflicting between the two records you are merging. Please select the correct client information before saving. This information will be saved locally until the client is backed up to My Aged Care.

	Captured offline	Online record
Title	Mr	Dr
Gender	Male	Not Specified

Cancel Save client merge

! It is important to view any potential duplicate records prior to registering a new client to prevent the creation of duplicate client records in My Aged Care.

- Once the offline client has been successfully registered or linked to an existing record, the client details page will display.

Dashboard

Harry Miller's Details

- About
- Event Summary and Approvals
- Refer for Assessment

Personal Information
Born 1st July 1938

Communication requirements
No communication requirements provided

Identity documents (ID)

Medicare	
DVA	
CRN	
ACMPS	
SPARC ID	
Aged Care ID	AC52447042

Identity status
Not Attempted

Health Insurance
No health insurance provided

Address details

Home address:	12 FURZER Street PHILIP
---------------	----------------------------

To upload the client to the assessor portal, you will need to link the client to a referral, by either [self-referring clients for assessment](#) to automatically link the client's assessment information prior to uploading or facilitating a referral for assessment prior to [linking to the registered client](#).

15.4 Linking offline clients and assessments

Before uploading the assessment, you will need to link the offline client (locally registered or saved) to an existing client in My Aged Care.

- In the Offline client's assessment, select **More Options**, then select **Add to Existing Client** at the pop up that appears.

Harry Miller

Client Profile

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

Title
Mr

First name
Harry

Middle name

Last name *
Miller

Date of Birth | **Estimated Age**

Estimated Age *
85

More options

- Remove Client from Device
- Register Client
- Add to Existing Client



2. You will be prompted to call 1800 836 799. Select **Yes** if you have:
 - Already contacted the My Aged Care contact centre, and had a referral sent to your organisation and assigned to you, or
 - Self-referred a client to your organisation.

! Needs assessors can select [Self refer](#) if the reason for assessment is in-hospital, remote assessment, First Nations or homeless or at risk of, and there is no existing referral for the client downloaded to their device.

For all other referrals, needs assessors are advised to call the My Aged Care service provider and assessor helpline on 1800 836 799.

! A person assigned the Team Leader role in the assessor portal will need to accept the referral and then a Triage Delegate can conduct triage or assign it to another Triage Delegate for triage. Once triage is completed and the assessment has been assigned to you then it will appear in your assessments queue in the assessor portal.

3. A list of existing clients that you can transfer the assessment information will appear. Select the name of the client, then select **Continue**.

Add to existing client

* Merge Harry Miller's Comprehensive Assessment information to:

Harry Boyer

Harry Jones

Harry Miller

This will remove Harry Miller's record from your device and transfer any answers from the assessment to the downloaded referral. Are you sure?

The assessment information collected about the offline client will now be transferred to the existing client, and the assessment can be uploaded to the My Aged Care assessor portal, following the process in [Uploading assessment and support plan information for downloaded assessments](#).

16. Conducting Support Plan Reviews

Needs assessors can use the App to:

- conduct Support Plan Reviews for clients' reviews they have downloaded
- conduct a Support Plan Review for a client they have previously assessed.

The steps to undertake a review on the App are as follows.

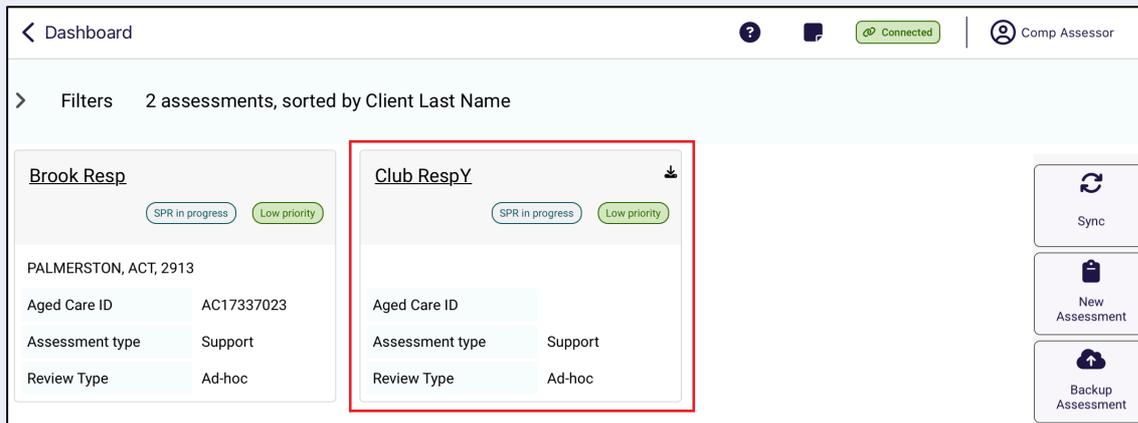
! To conduct a Support Plan Review (SPR), you must have the client assigned to you in the Assessor Portal before completing the SPR in the App.

16.1 Downloading a Support Plan Review

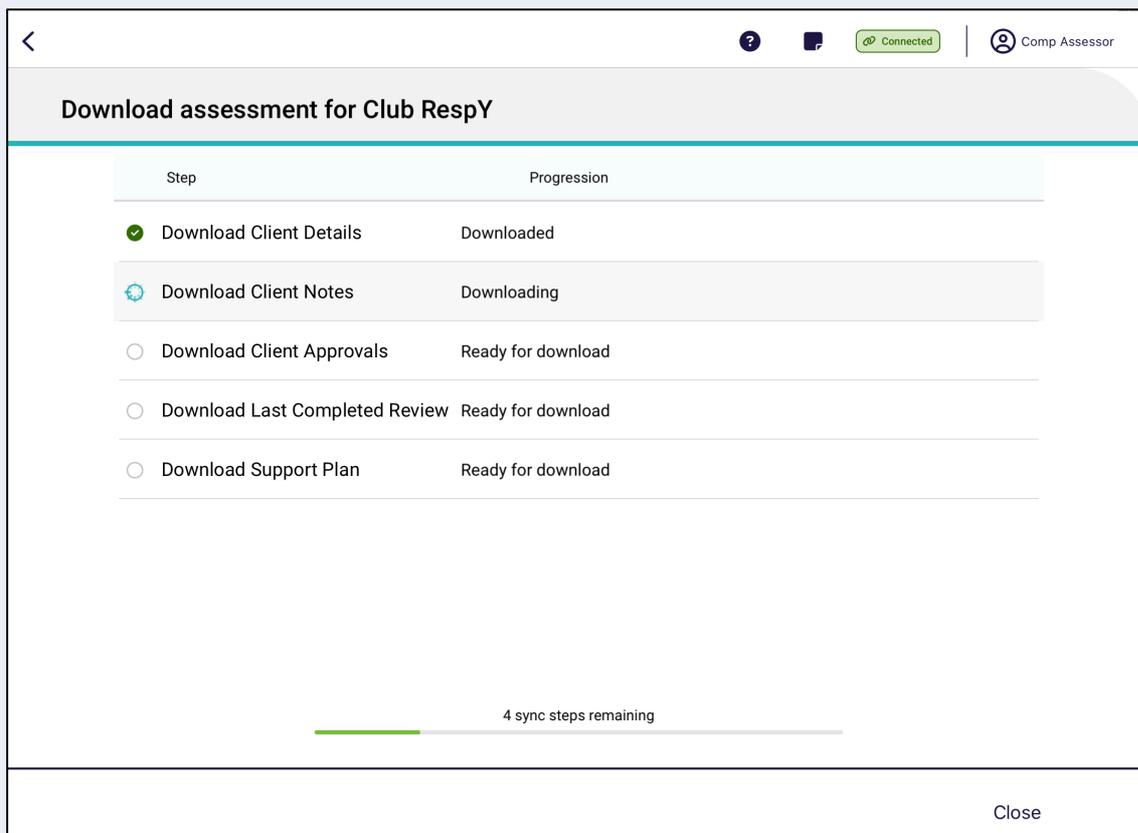
1. Open the App and navigate to the main dashboard. Search for the client using filters or sort function.

If all clients' details are synchronised and downloaded from the Assessor portal, go to [Completing a support plan review](#).

2. If the client's details are yet to be downloaded from the Assessor Portal, there will be a **Download** icon at the client card. Click on the client card to download the Support Plan Review.



3. The client tile will show the download in progress.



This is the page that shows the download progress of the Support Plan in detail. Select **Close** to return to the Dashboard.

4. Once downloading is finished, you will be able to click **Open assessment** to continue or return to the dashboard.



Download assessment for Club RespY

Step	Progression
✓ Download Client Details	Downloaded
✓ Download Client Notes	Downloaded
✓ Download Client Approvals	Downloaded
✓ Download Last Completed Review	Downloaded
✓ Download Support Plan	Downloaded

+ Open assessment Close

16.2 Completing a Support Plan Review

1. Select the client's card from the Dashboard.

Dashboard

Filters 37 assessments, sorted by Client Last Name

Georgina Smith Low priority

QUEANBEYAN, NSW, 2620

Aged Care ID AC36322840

Assessment type Comprehensive

Assessment status In progress

Completed Support Plan due by 29/06/2025 (30 days)

Michelle Smith End of Life High priority

Aged Care ID AC36219541

Assessment type Comprehensive

Assessment status In progress

Completed Support Plan due by 24/04/2025 (36)

Sync Referrals

New Assessment

Backup Assessments

2. Select the 'Support Plan' button.

Georgina Smith

Client Assessment Support Plan Upload Quick notes More options

- ✓ Client Profile
- Contact Details
- Support Network and Cohabitants
- Wallet check
- Event summary and Approvals
- Attachments
- Notes

Client Profile

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

Title

* First name

Middle name

* Last name

3. The Support Plan **Review** page will display.

The screenshot shows the 'Assessment Summary' page for Georgina Smith. The left sidebar contains a menu with 'Assessment Summary' selected and other options like 'IAT Outcome and Classifications', 'Identified Needs', 'Client concerns and goals', 'Recommendations', 'Associated People', and 'Review'. The main content area is titled 'Assessment Summary' and contains three sections: 'Introduction' (Ms Georgina Smith, age 84, contacted My Aged Care...), 'Situation' ([Add comments relating to current social situation].), and 'Background' (Georgina lives with Lives alone in PR Client Owns/Purchasing.). A note at the top right states 'All fields marked with an asterisk (*) are required.' The top navigation bar includes 'Client', 'Assessment', and 'Support Plan' tabs, along with 'Upload', 'Quick notes', 'Clear page information', and 'More options' buttons.

Before starting the review, you can view the client's support plan and review history (if applicable) by navigating to the **History** page.

In the **History** page, you can see details of the client's **Last Completed Review**. The support plan review request and outcome details will be displayed only if the client has previously had a review completed.

You can also start the review from the **History** page.

You can also view the client's:

- last completed review
- assessment summary
- identified needs
- client concerns and goals
- recommendations.

4. As well as viewing this information, you can schedule a future support plan review in the **Support Plan** tab.

The screenshot shows the 'Review' page for Xavier Banny. The left sidebar has 'Assessment Summary' checked and 'Review' highlighted with a red box. The main content area is titled 'Review' and contains two sections: '* Schedule a date to review the client's Support Plan' with a date picker, and '* Reason for review?' with a text input field. A note at the top right states 'All fields marked with an asterisk (*) are required.' The top navigation bar includes 'Client', 'Assessment', and 'Support Plan' tabs, along with 'Upload', 'Quick notes', and 'More options' buttons.

5. Navigate to each of the pages in the support plan to start the review. Once selected, the review will load which will allow you to edit the client's support plan.

! During the Support Plan Review, needs assessors can add general and service recommendations, Long-Term Living arrangement, and Periods of Reablement and Linking Support.

Assessors can recommend a **second Restorative care record to a Support At Home Restorative Care Pathway**. The second unit is subject to the number of available RCP places for any given financial quarter. For more information refer to [Support at Home program manual – A guide for registered providers](#).

Once the support plan is edited, the **Recommendations** section will display all recommendations made during the Support Plan edit. This means that any new recommended aged care records linked to the displayed classification (Support at Home, or End-Of-Life) will appear instead of the originally approved aged care records.

! During the Support Plan Review, if the client's recommendation is a Support at Home classification or a Transitioned Support at Home classification, assessors can reset (override) the classification to **Support At Home End-Of-Life Pathway**. This will need to be done after End-of-life documents are verified, and before submitting the Support Plan Review. Conversely assessors can also override a End-Of-Life Pathway recommendation to a Transitioned Support at Home classification.

6. Once the review is complete and all sections have been updated, you can upload the review, similar to [uploading assessments and support plan information](#).

17. Completing the match and refer process and finalising the assessment or completing the review

To complete the support plan and Support Plan Review, refer to the [My Aged Care – Assessor Portal User Guide 7 – Completing a support plan and support plan review](#)

Or to complete the match and refer process and finalise the assessment, refer to the [My Aged Care – Assessor Portal User Guide 8 – Referring for services](#)

! If you have undertaken an assessment using the App, you will need to contact the client to develop the client's support plan, confirm their referral preferences and obtain their consent to send referrals for service.

18. Removing assessments and reviews from the device

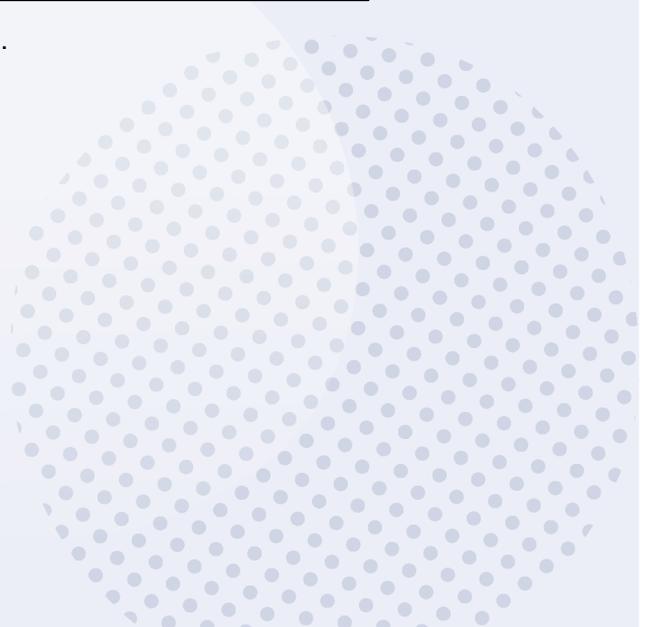
You may choose to remove client details from your device to increase storage space and allow for easier navigation from the App Dashboard. To manually remove client details from the device, follow the steps below.

! Removing a client record from the device will permanently delete any assessment or review information recorded on that device and that has not been uploaded to the assessor portal.

1. Open the App. The dashboard page will be displayed, select your outlet that contains the client's assessment. Once in the outlet, search and select the client card.

2. From any page in the client’s record, you can remove the record from the device by selecting **More options** and then **Remove Client from Device** from the pop up.

Select **Remove Assessment** to remove the record.



! Clients with uploaded assessments will still appear in the app when you select **Refresh** until you complete the client's support plan in the assessor portal.

19. Completing a Residential Respite Classification Assessment

! Unlike Support Plan Reviews and Comprehensive assessments, Residential Respite Assessments can only be completed from the App. If you are using a PC or Laptop to complete the assessment, a [Windows compatible \(sideloaded\) version](#) of the App is available.

Residential Respite Assessments are an assessment of the care recipient's mobility utilising the Modified de Morton Mobility Index (DEMMI-modified). Respite Classifications are used to determine the level of subsidy Residential Service Facilities will receive for the care of Respite clients under the Australian National Aged Care Classification (AN-ACC) funding model.

There are 12 tasks in DEMMI-modified, select one rating only for each of the twelve tasks that best matches the resident's capabilities.

The DEMMI-modified is an instrument that measures the mobility of older people across clinical settings. It is preferably based on direct observation of the resident. However, it is not appropriate to ask a resident to complete tasks if there is a falls risk or risk of causing distress to the resident. The clinical needs assessor should use their clinical judgement to evaluate if the DEMMI-modified can be undertaken and at what point the assessment should cease.

The four DEMMI domains are:

- bed mobility
- chair
- static balance (no gait aid)
- walking.

Only clinical needs assessors who have completed training in DEMMI-modified based respite assessments under the AN-ACC funding model can assess clients using the DEMMI-modified.

For information on the DEMMI-modified tool, refer to the [AN-ACC Reference Manual](#).

To complete the DEMMI-modified in the App first an assessment must be downloaded to the App. Refer to [Self-Refer a Care Recipient for a Residential Respite Assessment](#) or [Complete an assigned Residential Respite Assessment Referral](#) for guidance.

Clinical needs assessors can use the App to:

- conduct a Residential Respite Classification Assessment they have downloaded
- self-refer Residential Respite Classification Assessments
- reject Residential Respite Classification Assessments.

19.1 Refer for a Residential Respite Assessment

! Unlike Support Plan Reviews and Comprehensive assessments, Residential Respite Assessments can only be completed from the App. If you are using a PC or Laptop to complete the assessment, a [Windows compatible \(sideloaded\) version](#) of the App is available.

1. Open and log in to the App. Select **Find A Client** from the dashboard. You can follow the steps set out in the section [Finding a client](#).

The screenshot shows the 'Comp Assessor' dashboard. At the top, it says 'Welcome Comp Assessor' and 'Referrals last synced 11:44 today'. The main section is 'Assessment Outlets', which includes a table for 'UAT SAS trial Outlet' with a 'Due in 19 days' status. The table lists various stages and their counts: Triage Not Started (2), Urgent Services Pending Triage (0), Triage In Progress (2), Assessment Not Started (0), Assessment In Progress (1), and SPR In Progress (2). To the right of the table are three buttons: 'Sync', 'No uploads pending', and 'Find A Client' (highlighted with a red box). Below the table is the 'Facilities (AN-ACC)' section, which shows 'In home respite'.

2. Search and open the client's record.

Once you are in the client's record, confirm that the personal details are correct. Then, select **Event Summary and Approvals** and ensure that the client has a current Residential respite care approval.

The screenshot shows the client record for 'Barry Bartels'. The left sidebar has three options: 'About', 'Event Summary and Approvals' (highlighted with a red box), and 'Refer for Assessment'. The main content area is divided into three sections: 'Triage History', 'Other recommendations', and 'Current care approvals'. The 'Triage History' section shows a completed triage on 06 June 2024. The 'Other recommendations' section shows 'Residential Respite Care (Low priority)'. The 'Current care approvals' section lists three approvals: 'Home Care Package Level 1', 'Residential Permanent', and 'Residential Respite Low Care'. The 'Residential Respite Care' approval is highlighted with a red box, showing an approval start date of 6 June 2024.



3. Go to the Refer for Assessment tab, and select the type **Residential Respite Assessment**.

Input an Assessment date, ensure the assessment date is the date that you conducted the assessment. The Assessment date may impact the effective date of the classification that is generated and subsidy paid to the provider.

Confirm the correct Assessment Setting is selected and once the details are correct and click **Create Referral**.

Barry Bartels's Details

- About
- Event Summary and Approvals
- **Refer for Assessment**

Refer Barry Bartels for Assessment

A Residential Respite referral will be created for the client.

Select an outlet for referral

UAT SAS trial Outlet

Select an assessment type: *

Residential Respite Assessment

Assessment date *

06/06/2024

Assessment Setting: *

Non-Hospital

Reason for self referring:

Change in Respite Care needs

Create Referral

A confirmation screen appears, confirming that the referral was created successfully. Click the **Go Back** button to return to the Dashboard to the downloaded client that you have self-referred.

Dashboard

Barry Bartels's Details

- About
- Event Summary and Approvals
- **Refer for Assessment**

Refer Barry Bartels for Assessment

A Residential Respite referral will be created for the client.

Referral created successfully
Go back to home screen to download client

Go Back

Refer to [Starting an assigned Residential Respite Assessment Referral](#) on how to complete the DEMMI-modified.



19.2 Starting an assigned Residential Respite Assessment Referral

Residential Respite Assessments that have been assigned to you by your Team Leader will automatically appear on your App. To access your assigned Residential Respite Assessments, navigate to the Dashboard and click on your outlet.

The dashboard shows a 'Welcome Comp Assessor' message with 'Referrals last synced 13:09 today'. A summary table for 'UAT SAS trial Outlet' (Due in 25 days) is displayed:

Category	Count
Triage Not Started	3
Urgent Services Pending Triage	0
Triage In Progress	3
Assessment Not Started	0
Assessment In Progress	1
SPR In Progress	2

Below this is a section for 'Facilities (AN-ACC)' with a sub-section for 'In home respite' (highlighted with a red box):

Category	Count
Not started	0
In progress	1
Completed	1

On the right side of the dashboard, there are buttons for 'Sync', 'No uploads pending', 'Find A Client', and 'Backup Assessment'.

To complete the assessment, click on the client's card to download the assessment to your device.

The screen shows a list of assessments under 'In home respite (2 Assessments)'. Two client cards are visible:

- Barry Bartels** (highlighted with a red box): Status 'Not started', 'Self referral', 'Client matched'. Aged Care ID: AC91331652. Date of birth: 25/03/1942. Assessment type: Residential Respite.
- Harry Miller**: Status 'Reassigned', 'In progress'. Aged Care ID: [blurred]. Date of birth: 01/07/1938. Assessment type: Residential Respite.

A 'Sync' button is located to the right of the Harry Miller card.

Select **Start Assessment**.

The screen displays the details for Barry Bartels (AC91331652, 25 Mar 1942, Female) and a confirmation message: 'You are about to start an assessment for Barry Bartels (AC91331652, 25 Mar 1942, Female). This will put the assessment in-progress.' A large 'Start Assessment' button (highlighted with a red box) is prominently displayed on the right side of the screen.



19.3 Completing a Residential Respite Assessment

1. Confirm the client details are correct by reviewing the **Identification and assessment details** section.
2. Select the **de Morton Mobility Index (DEMMI) – Modified** tab to complete the Modified DEMMI Assessment.

Select the question mark to display tool help. This will provide guidance on how to complete the assessment. Complete all mandatory fields until the page has a tick next to it.

The screenshot shows the 'DEMMI' assessment form for 'In home respite AC91331652', which is 67% complete. The left sidebar has three tabs: 'Identification and assessment details', 'De Morton Mobility Index (DEMMI) - Modified' (highlighted with a red box), and 'Assessor comments form'. The main content area is titled 'DEMMI' and includes a note: 'All fields marked with an asterisk (*) are required.' Under the 'Bed' section, there are three questions:

- *Bridge**: Radio buttons for 'Unable' and 'Able'.
- *Roll onto side**: Radio buttons for 'Unable' and 'Able'.
- *Lying to sitting**: Radio buttons for 'Unable', 'Minimal assistance', 'Supervision', and 'Independent'.

Each question has an information icon (i) in the top right corner. The 'Chair' section below has one question: ***Sit unsupported in chair** with radio buttons for 'Unable' and '10 seconds'.

3. Tool tips are available by selecting the information icon in the top right-hand corner of each question.

This screenshot shows the same 'DEMMI' assessment form, but with the tool tip for the '*Bridge' question displayed. The tool tip text is: 'Person is lying supine and is asked to bend their knees and lift their bottom clear of the bed'. The 'Bridge' question's radio buttons are 'Unable' and 'Able'. The other questions in the 'Bed' and 'Chair' sections remain the same as in the previous screenshot.

4. Once the assessment is complete you may add comments, these comments will be stored with the assessment and can be viewed by the department if needed.

In home respite
AC91331652

100% complete

Complete More options

Identification and assessment details

De Morton Mobility Index (DEMMI) - Modified

Assessor comments form

Comments

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

Please add any comments you have in relation to this assessment below:

Test example of assessor notes.

31/4000

Once the assessment is complete select the **Complete** button.

In home respite
AC91331652

100% complete

Complete More options

Identification and assessment details

De Morton Mobility Index (DEMMI) - Modified

Assessor comments form

Comments

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

Please add any comments you have in relation to this assessment below:

Test example of assessor notes.

31/4000

5. Select **Complete Assessment** at the next screen. This will submit the assessment and generate a classification for the client, there is no further action required.

Complete Assessment

You are about to complete this assessment

Once completed you cannot edit the assessment, however you will be able to review it and upload it.

You can Reopen the assessment to edit it by 'Reopening' it before uploading.

Complete Assessment

6. Following this you will be re-directed to the Upload Assessment page. Select **Upload**.

Upload Assessment

Assessment Summary: Residential Respite

Name Aayden Johnson

Date of Birth 5 February 1940

Gender Female

Date of Assessment 26 September 2024

PPE supplied and used

Is the Client receiving care in a Memory Support Unit?

DEMMI

Bed

Bridge Unable

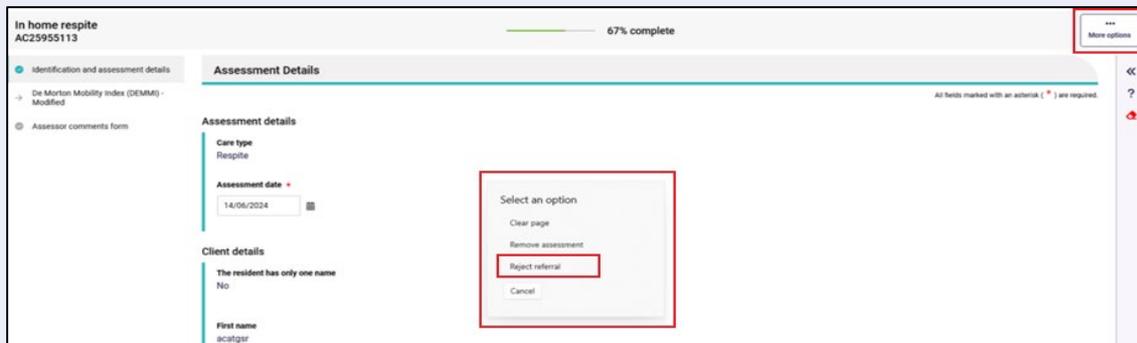
Upload



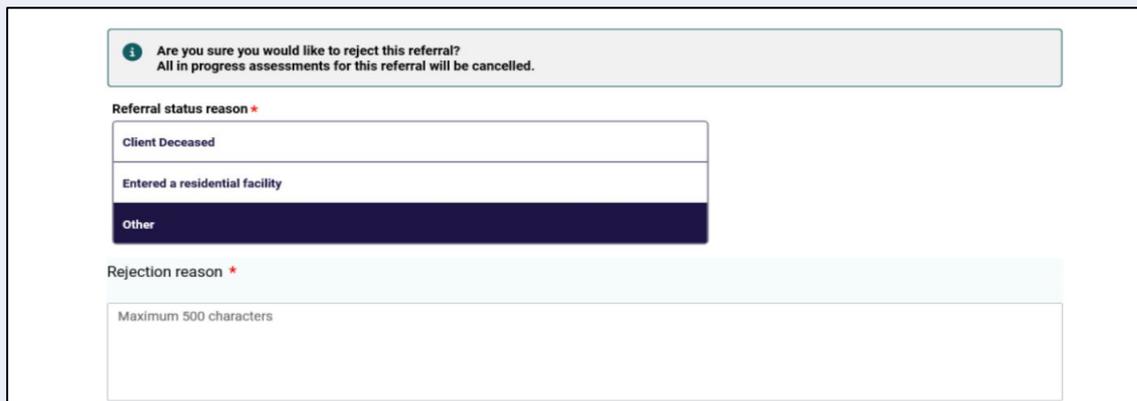
19.4 Rejecting a Residential Respite Assessment

If a Team Leader assigns a residential respite assessment to you, you can choose to reject it.

1. Open and log in to the App, [download and open an assessment](#). Select actions in the top right corner, then select **Reject Referral** from the pop up.

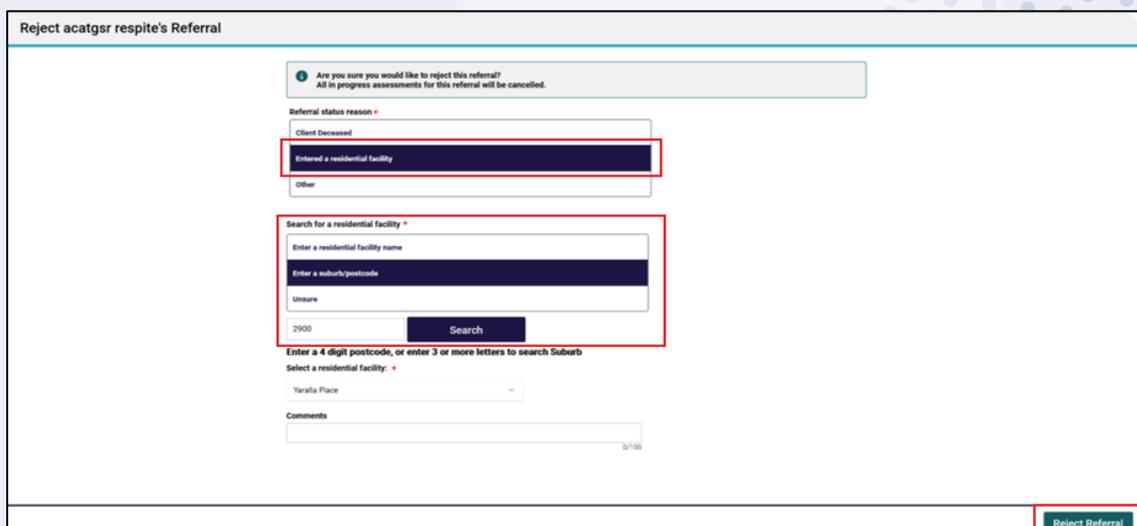


2. Select the appropriate rejection reason, this may be either **Client Deceased**, **Entered a residential facility** (Refer to Step 3), or **Other** (below). Please note, for the reason **Client Deceased** please contact your team lead or the My Aged Care contact centre to complete the process.



3. If the client has entered a residential service facility, please select **Entered a residential facility**. These referrals will now be assigned to an appropriate RFA Organisation.

The options provided are either searching by residential facility name or suburb/postcode; Or if you are unsure, please select **Unsure** and a departmental officer will be assigned the referral manually.



4. Once all the criteria have been entered select **Reject Referral**. The referral will now be rejected, there is no further action needed.
5. Residential Respite Assessments for clients who have entered a residential facility are to be completed by Residential Funding Assessors. If a client has entered a Residential Facility, reject the referral due to Entered a residential facility by completing the following steps:
 - a. Select Entered a residential facility.
 - b. Either enter a residential facility name, enter a suburb/ postcode or if you are unsure select Unsure.
 - c. Select Search.
 - d. Scroll down until the applicable Residential Facility has been highlighted and select done.

! You can upload an assessment to the My Aged Care assessor portal from the App without answering all mandatory questions. However, you will need to complete all mandatory questions before you can complete the assessment in the My Aged Care assessor portal.

Clinical needs assessors are expected to contact the client to confirm the outcome of the assessment, discuss the client's service preferences, and obtain consent to send referrals for service.

Part C - Residential aged care funding assessments (RAC funding assessors)

20. Conducting an RAC funding assessment

! 'Assessment' in part C refers to residential aged care funding assessments completed by residential aged care funding assessors who complete assessments using the Australian National Aged Care Classification (AN-ACC) assessment tool.

20.1 Find a client

1. On the **Facilities** page, all assessment referral/s that have been assigned to you will be listed. Scroll up and down to view more facilities and clients. Select a facility to display all referrals for that Facility that are assigned to you.

The screenshot shows the 'Facilities (AN-ACC)' page in the My Aged Care app. At the top, it says 'Welcome Unrestricted 1 UAT' and 'Referrals last synced 13:39 today'. Below this, there are two facility cards, each with a table of referral counts. The first card is for 'Edge Hill Orchards' (365 days overdue) and the second is for 'Gosling Creek Aged Care' (270 days overdue). To the right of these cards are four buttons: 'Sync', 'No uploads pending', 'Quality Assurance', and 'No backups pending'.

Facility	Not started	In progress	Completed
Edge Hill Orchards	1	0	0
Gosling Creek Aged Care	4	0	0

- Once you have clicked on the facility you are wanting to assess in, the resident referrals for this facility will be displayed. Scroll up and down the page to locate the resident you wish to assess or use sort and filter options to narrow the number of residents being displayed.

! If you are not connected to the internet, only referrals that have been previously downloaded will be available. It is recommended that you sync your device daily before commencing.

You can filter or order referrals in the following ways:

- filtering on keyword for example First Name, Last Name or Aged Care ID
- filtering on the Status (Assessment status)
- filtering Assessment type
- order on First Name or Last name in ascending or descending alphabetical order
- sorting on due or departure date in ascending or descending order.



Select the Filter dropdown to expand the filter menu. It displays the Sort By option and Filter options. The Filter option text box is an active search. It will refine results when typed.

In the following example, the residents are sorted by Last name in ascending alphabetical order, and any residents' names that contains "Ra" will appear.

The screenshot shows the 'Filters' section of the My Aged Care interface. At the top, it indicates '1 assessment, sorted by Last Name A-Z, filtered by 'Ra''. Below this, there is a 'Keyword' search box containing 'Ra'. The 'Order' dropdown is set to 'Last Name A-Z'. The 'Status' dropdown is set to 'Select a status' and the 'Assessment type' dropdown is set to 'Select an assess...'. A 'Clear filters' button is visible. Below the filters, a resident record for 'Ram Chandra' is displayed. The record shows '115 days overdue', 'Not started', and 'Reassessment' buttons. The resident's details are: Aged Care ID: AC03906039, Date of birth: 03/05/1976, and Assessment type: Residential Respite. To the right of the record are three action buttons: 'Sync', 'New Assessment', and 'Quality Assurance Assessment'.

3. Select the resident's record.

Depending on the resident's assessment status, selecting the record will either start the assessment, or will be directed to the first page of the assessment in progress.

Start of an assessment

The screenshot shows the 'Start of an assessment' screen for a resident named Nia Sharma. The header shows 'Nia Sharma' and a chat icon. The main content area contains the text: 'You are about to start an assessment for Nia Sharma (AC67952275, 03 Feb 1967, Female). This will put the assessment in-progress.' Below this text are two buttons: 'Start Assessment' (with a play icon) and 'Reject Referral' (with a trash icon). At the bottom, there is a question: 'Is a quality assurance or training assessment also being conducted?' with two buttons: 'QUALITY ASSURANCE' and 'TRAINING'.

Assessment in progress

Nia Sharma
Connected
Unrestricted 1 UAT

UAT Pitz RESI- HCP & STRC outlet
AC67952275

18% complete

More options

- ✓ Identification and assessment details
- Palliative Care
- Nursing
- Resource Utilisation Group - Activities of Daily Living
- Australia-modified Karnofsky Performance Status
- Frailty
- Braden Scale
- De Morton Mobility Index (DEMMI) - Modified
- Australian Modified - Functional Independence Measure
- Behaviour Resource Utilisation Assessment
- ✓ Assessor comments form

Assessment Details

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

Assessment details

Care type
Permanent

Assessment date *
30/05/2024

***Was PPE supplied by your organisation used?**

Yes No

***Is the Client receiving care in a Memory Support Unit?**

Yes No

Client details

The resident has only one name

No

20.2 Self-Referral

! Prior to conducting a self-referral, RAC funding assessors should contact the department.

RAC funding assessors can self-refer the assessment when they identify a resident in a service or facility that does not have an assessment referral. This could happen if the resident has entered care since the time of the assessment referral being issued.

1. Select **New Assessment** on the right-hand side in the facility dashboard menu.

Dashboard UAT Pitz RESI- HCP & STRC outlet (7 Assessments)
Connected
Unrestricted 1 UAT

Filters 7 assessments, sorted by First Name A-Z

AGAntwon UATHayes

237 days overdue Not started

Aged Care ID	AC23765274
Date of birth	09/11/1940
Assessment type	Residential Permanent

AGLeonard UATLinnie

237 days overdue Not started

Aged Care ID	AC08129645
Date of birth	08/12/1940
Assessment type	Residential Permanent

AGNorval UATKoelpin

237 days overdue Not started

Aged Care ID	AC83537217
Date of birth	18/09/1940

AGZiemann UATFrieda

237 days overdue Not started

Aged Care ID	AC35942036
Date of birth	02/03/1941

Sync

New Assessment

Quality Assurance Assessment

No uploads pending

No backups pending

For further information, go to My Aged Care | www.myagedcare.gov.au | 1800 836 799

177

- The **New assessment** screen appears. Enter the resident's My Aged Care client identifier (AC ID) and select **Search**. The service provider will be able to provide the AC ID for the resident.

UAT Pitz RESI- HCP & STRC outlet (7 Assessments) New assessment

New Assessment

Enter the client's My Aged Care identifier to search for their client record

AC53206991

Search

10/10

- Check the details of the search result. If the details are correct, select the record to start the assessment.

UAT Pitz RESI- HCP & STRC outlet (7 Assessments) New assessment

New Assessment

Enter the client's My Aged Care identifier to search for their client record

AC53206991

Search

10/10

i The following client record matches the client identifier that you entered.
If the details provided below match the personal details of the client, click on the client record card below to commence their assessment.
Otherwise, correct the client identifier and search again.

Daniella Romine
Date of Birth: 5 March 1941
AC53206991
Gender: Female

- If required, fill in any mandatory fields in the **Add Client** page, by selecting the appropriate options. Mandatory fields are shown by a red line over the field name and a red asterisk.

New assessment Add client

Care Type * Permanent Respite

Self-Referral Reason * New Permanent Resident Respite Resident

Assessment Date 30/05/2024 ?

Aged Care ID * AC53206991



5. Once all mandatory fields are complete, select **Start Assessment**.

New assessment Add client

Care Type* Permanent Respite

Self-Referral Reason* New Permanent Resident Respite Resident

Assessment Date ?

Aged Care ID* 10/10

The resident has only one name

First Name* 8/50

Last Name* 6/50

Date of Birth ?

Gender* Female

Start Assessment

6. The client record will now appear in the main menu under the status of **In-progress**. You can use the filter function to highlight all the assessments with this status.

Dashboard UAT Pitz RESI- HCP & STRC outlet (6 Assessments) ? Connected | Unrestricted 1 UAT

Filters 2 assessments, sorted by First Name A-Z

Keyword

Order First Name A-Z **Status** In Progress - 2 **Assessment type**

× Clear filters

Client Name	Status
AGMarlee UATColt	252 days overdue In progress
Pridata UAT	256 days overdue Urgent In progress

Client Name	Aged Care ID	Date of birth	Assessment type
AGMarlee UATColt	AC34890376	31/07/1941	Residential Permanent
Pridata UAT	AC98773435	01/07/1924	Residential Permanent

- Sync Referrals
- New Assessment
- Quality Assurance
- Upload 2 Completed
- Backup 4



20.3 Undertaking Assessments

The steps to undertake an assessment on the App are as follows.

! For comprehensive information on how to complete the clinical component of the assessment, refer to your [AN-ACC Assessor Manual](#).

1. Open and log in to the App, following the process in [Find a Client](#), locate the resident you wish to assess and open their assessment referral.
2. Complete each page of the assessment which includes clinical tools.

The below screenshot shows a typical page in an assessment.

The screenshot shows the assessment interface for 'UAT Pitz RESI- HCP & STRC outlet AC67952275'. The progress bar indicates 36% completion. The left sidebar lists assessment sections: Identification and assessment details (checked), Palliative Care (checked), Nursing (checked), Resource Utilisation Group - Activities of Daily Living (teal arrow), Australia-modified Karnofsky Performance Status (arrow), Frailty (arrow), Braden Scale (arrow), De Morton Mobility Index (DEMMI) - Modified (arrow), Australian Modified - Functional Independence Measure (arrow), Behaviour Resource Utilisation Assessment (arrow), and Assessor comments form (checked). The main content area is titled 'RUG-ADL' and includes a note: 'All fields marked with an asterisk (*) are required.' Two sections are visible: '*Bed Mobility' and '*Toileting'. Each section has a list of options: 1 - Independent or Supervision only, 2 - (Not a valid option for this question), 3 - Limited physical assistance, 4 - Other than two persons physical assist, and 5 - Two or more persons physical assist. The '2 - (Not a valid option for this question)' option is highlighted in grey in both sections.

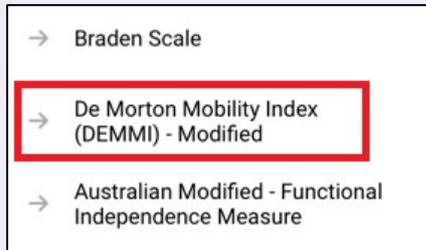
As you complete each section, the progress bar shows grey ticks for each completed and teal arrows for in progress or incomplete sections.

This close-up shows the assessment sections list. The first three sections, 'Identification and assessment details', 'Palliative Care', and 'Nursing', are each preceded by a grey checkmark icon. The fourth section, 'Resource Utilisation Group - Activities of Daily Living', is preceded by a teal arrow icon. The fifth section, 'Australia-modified Karnofsky Performance Status', is preceded by a grey arrow icon. Red boxes highlight the checkmarks for the first three sections and the teal and grey arrows for the last two sections.

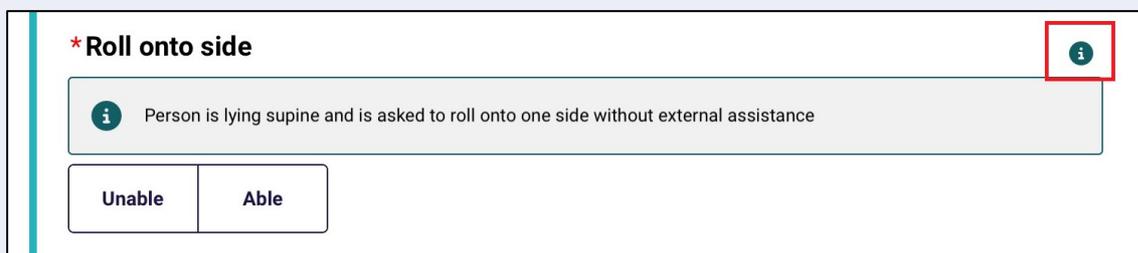
There is an overall assessment progress percentage complete indicator at the top of the screen.



Select a specific clinical tool or page by selecting the associated tab.

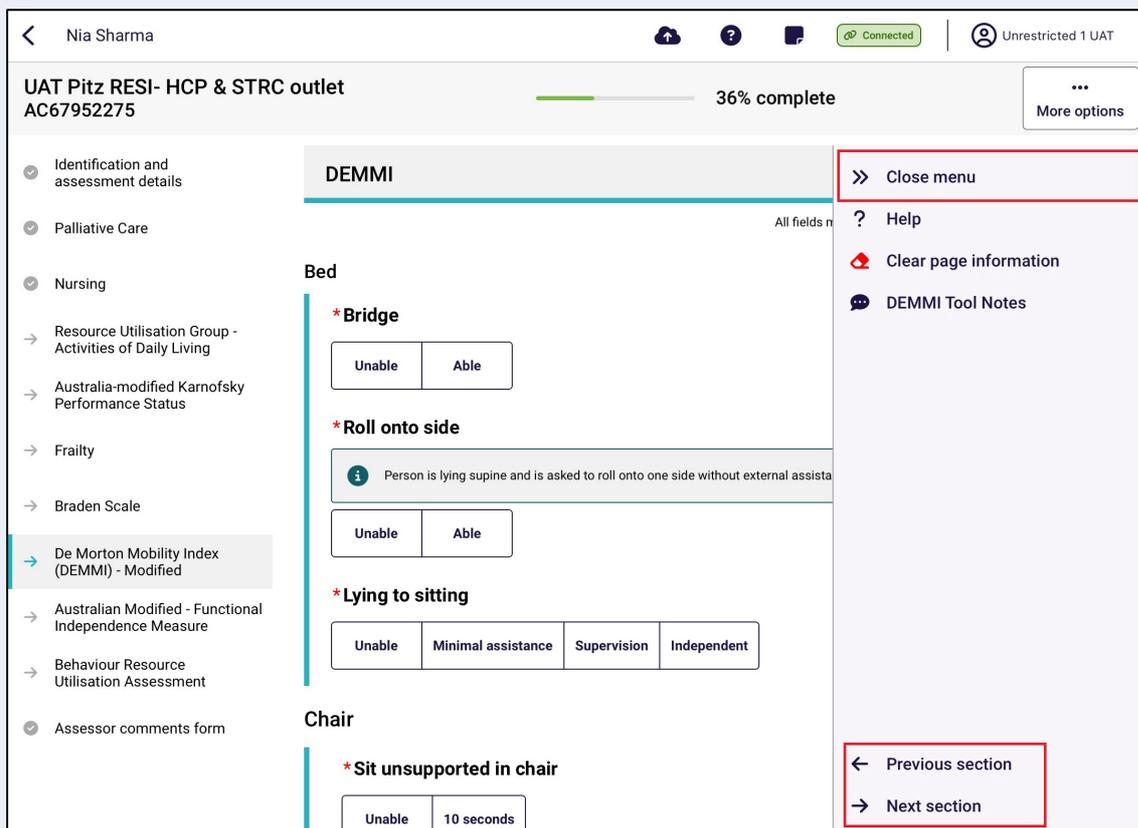


Select the information  icon next to each question, to find out more information about the question.

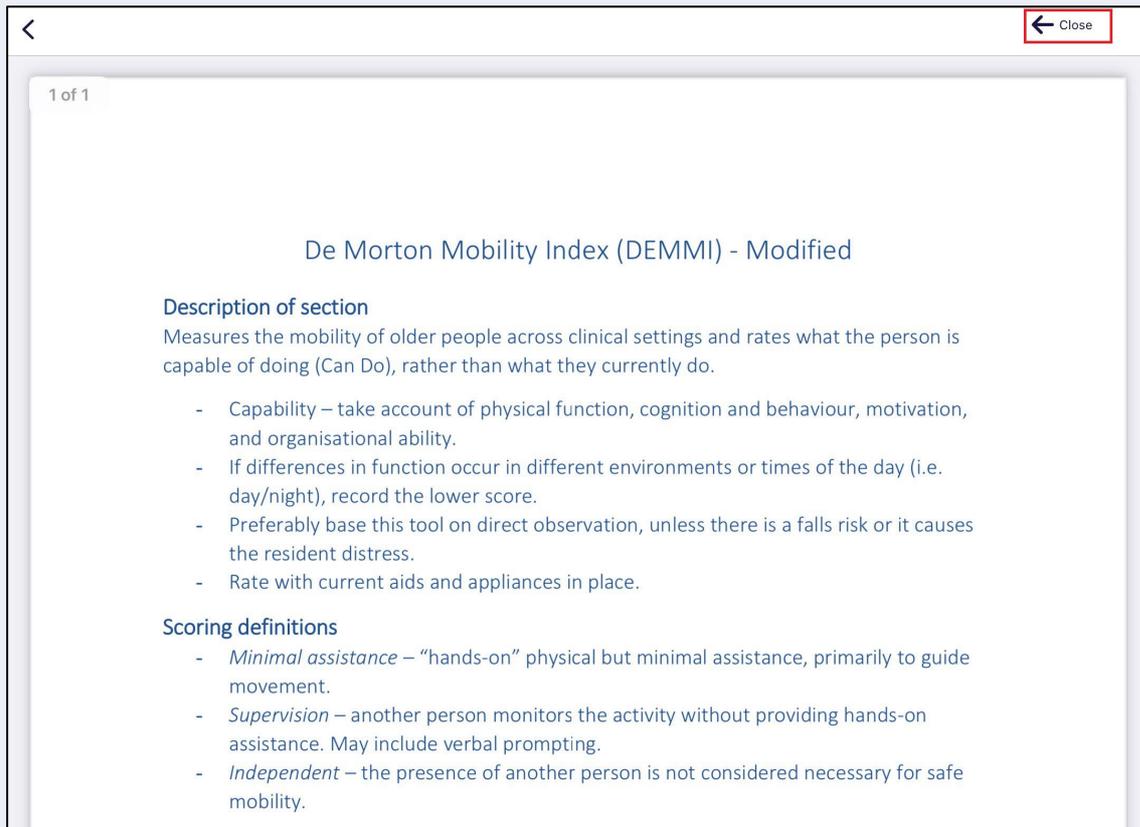


! You must fill out all mandatory questions. Mandatory fields are shown by a red line over the field name and a red asterisk.

Select the double chevron << on the top right side of the screen to expand the menu and to navigate to the previous and next sections.



In this menu you can also select? **Help** to display more detailed information about that page or tool. It will open on another screen. Select **Close** to return to the assessment.

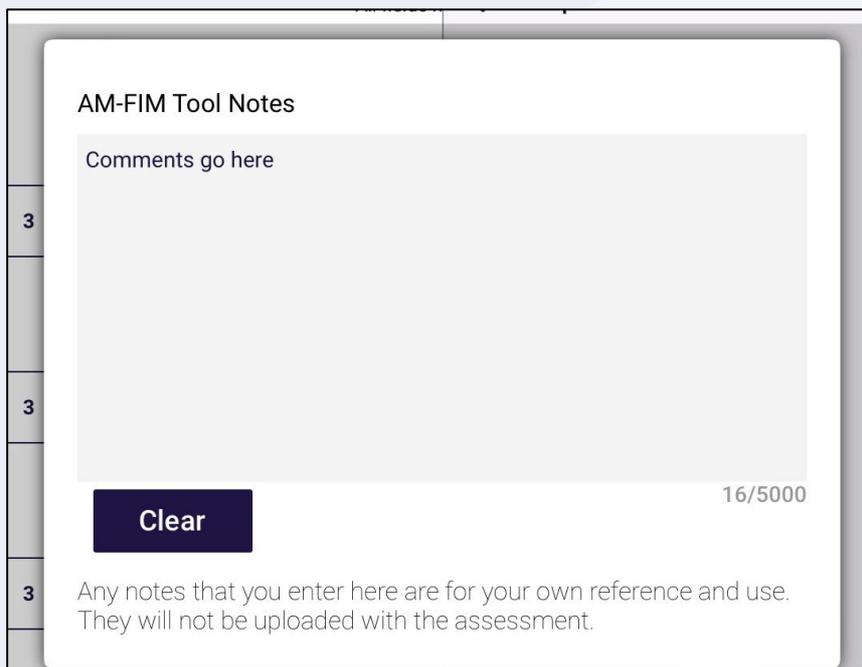


On each tool, there is a notes section where you can enter notes or comments.

Selecting the speech bubble icon  next to this section will expand the comments section.

Any comments made here are for your own reference and will not be uploaded with the assessment.

The below screenshot example shows the **AM-FIM Tool Notes** page.

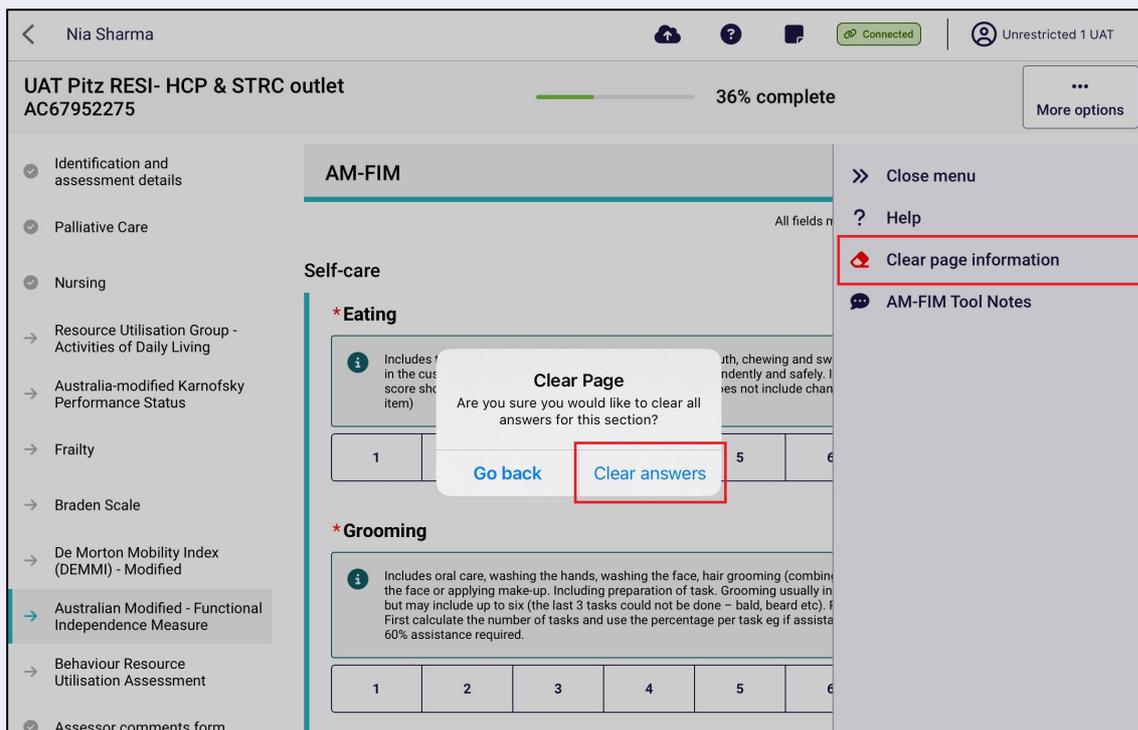


With some notes sections there is an additional information  section. It gives additional information to that in the Help sections.

 **AM-FIM Tool Notes**

1	Total assistance (subject = less than 25%)
2	Maximal assistance (subject = 25%+)
3	Moderate assistance (subject = 50%+)
4	Minimal assistance (subject = 75%+)
5	Supervision (subject = 100%+)
6	Modified independence (device)
7	Complete independence (timely, safely)

Finally, there is a **Clear page information** section denoted by the red eraser icon. Select this and then select **Clear answers** at the pop-up, to permanently erase answers.



The screenshot shows the AM-FIM assessment tool interface. On the left, there is a navigation menu with categories like 'Identification and assessment details', 'Palliative Care', 'Nursing', and 'Assessor comments form'. The main content area is titled 'AM-FIM' and shows 'Self-care' tasks under 'Eating' and 'Grooming'. A 'Clear Page' dialog box is open, asking 'Are you sure you would like to clear all answers for this section?' with 'Go back' and 'Clear answers' buttons. On the right, a 'More options' menu is visible, with 'Clear page information' highlighted by a red box. The top of the screen shows the user's name 'Nia Sharma', a 'Connected' status, and 'Unrestricted 1 UAT'.

21. Undertaking Quality Assurance and Training Assessments

RAC funding assessors can conduct Quality Assurance and Training assessments in the App. There are two methods available.

! Quality Assurance and Training assessments cannot be undertaken on self-referred assessments.

21.1 Sharing referral details with the assessor undertaking the assessment

The unrestricted RAC funding assessor is assigned to undertake the assessment.

1. Out of your facilities, select the facility where the resident being assessed lives.

Welcome Unrestricted 1 UAT
Referrals last synced 13:39 today

Facilities (AN-ACC)

Facility Name	Overdue Status	Address	Not started	In progress	Completed
Edge Hill Orchards	365 days overdue	15 OREGON Street MANOORA QLD	1	0	0
Gosling Creek Aged Care	270 days overdue	1501-1503 Forest Road ORANGE NSW	4	0	0

Sync
No uploads pending
Quality Assurance
No backups pending

2. Next, select the client.

Dashboard UAT Pitz RESI- HCP & STRC outlet (7 Assessments)

Filters Filters applied 2 assessments, sorted by First Name A-Z, filtered by 'Ni'

Client Name	Overdue Status	Aged Care ID	Date of birth	Assessment type
AGLeonard UATLinnie	238 days overdue	AC08129645	08/12/1940	Residential Permanent
Nia Sharma	102 days overdue	AC67952275	03/02/1967	Residential Permanent

Sync
New Assessment
Quality Assurance Assessment
No uploads pending
No backups pending



3. A Pre-assessment screen appears. The assigned assessor can select if a **Quality Assurance** or **Training** assessment is also being conducted.

< Nia Sharma

You are about to start an assessment for Nia Sharma (AC67952275, 03 Feb 1967, Female).

This will put the assessment in-progress.

Start Assessment Reject Referral

Is a quality assurance or training assessment also being conducted?

QUALITY ASSURANCE TRAINING

4. The assessment details to be shared will be displayed. The RAC funding assessor that will be conducting the Quality Assurance or Training assessment must scan the QR code or enter the Referral ID on their device.

< Nia Sharma

Connected Unrestricted 1 UAT

QUALITY ASSURANCE TRAINING

⚠️ A dual assessment for quality assurance purpose must include assessors that both have an unrestricted status.
 Both assessors must have spent the same or similar amount of time at the facility of the resident being assessed.
 Both assessors must observe the resident at the same time.
 Both assessors must have access to the same information at the same time.
 Both assessors must attend the full assessment of the resident.
 Either assessor may ask questions during the assessment.
 The assessors must not engage with each other during the assessment.
 Assessment outcomes should not be influenced by the other assessor.
 Upon completion the assessment outcomes should be uploaded through the ACA tool on the same day as the assessment.

The assessor should scan this code via their device

Enlarge QR code

or they can manually enter the following:

Referral ID 2-1Y8UZ69C

Client details

ACID AC67952275

First name Nia

Last name Sharma

Gender Female

D.O.B 03/02/1967

Alternatively, referral details can also be shared after starting an assessment. On the assessment page, select the **ellipses (three dots)** and select **Share referral details** at the pop-up.

The screenshot shows the 'Assessment Details' page for 'UAT Pitz RESI- HCP & STRC outlet AC67952275'. The page is 9% complete. A 'More options' menu is open in the top right corner, with the 'Share referral details' option highlighted. The assessment form includes fields for 'Care type' (Permanent), 'Assessment date' (31/05/2024), and two required questions: '* Was PPE' and '* Is the Client receiving care in a Memory Support Unit?'. The 'Client details' section shows 'The resident has only one name' as 'No'.

In the Share referral details screen, select the **Quality Assurance** or **Training** options.

The 'Share referral details' screen displays the question 'Is a quality assurance or training assessment also being conducted?'. Below the question, two buttons are visible: 'QUALITY ASSURANCE' and 'TRAINING', both of which are highlighted with a red box.

! Referrals can only be shared by the assessor assigned to undertake the assessment. Referrals cannot be shared after the assessment is finalised and uploaded.



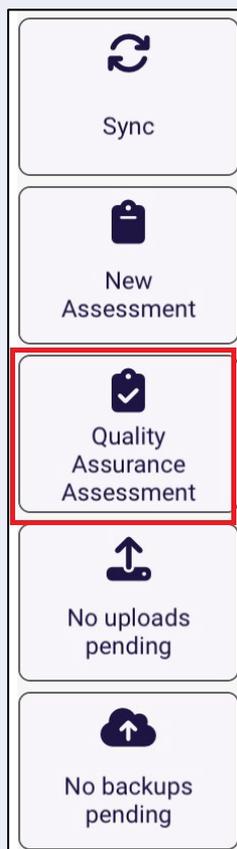
21.2 Scanning referral QR code or entering the referral ID

1. Select the appropriate assessment button under **Quick Actions** in the main menu.

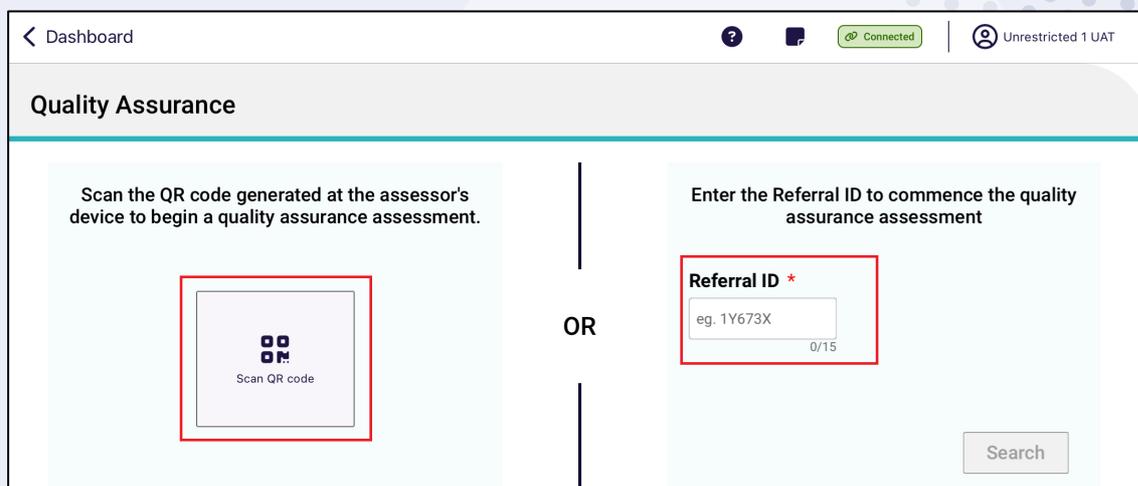
! The **Quality Assurance** and **Training** buttons visible will be dependent on the role of the user.

Senior RAC funding Assessors undertaking a Quality Assurance will need to select the **Quality Assurance** button, or if conducting a Training assessment, select the **Training** button.

A RAC funding assessor (Restricted) undertaking a Training assessment will need to select the **Training** button.



2. Select either to **Scan the QR code** generated on the device of the RAC funding assessor that will undertake the assessment, or enter the **Referral ID**. Then select **Search**.



After the Referral ID is successfully matched, confirm the client's details before starting the Quality Assurance or training assessment.

If the RAC funding assessor has been unable to successfully match the Referral ID, this could be due to a [connectivity issue](#) or the referral ID is not valid. If there is a connectivity issue a [local \(offline\) assessment](#) can be undertaken.

3. The Quality Assurance or Training assessment screen will now appear. A banner at the top of the screen indicates the type of assessment type that is being undertaken. The below screenshot shows the Quality Assurance assessment example.

You are conducting a Quality Assurance Assessment

! RAC funding assessors that have started a Quality Assurance or a Training assessment will not have the ability to reject the referral, but can remove the assessment.

21.3 Local (Offline) Assessments

Assessments could be done offline if there is an issue with internet connectivity. This applies to normal assessments as well as Quality Assurance and Training assessments. However, the assessment cannot be uploaded to the My Aged Care system until the client details that were entered whilst offline are successfully matched with a client record in the system.

The screenshot shows the 'New Assessment' screen. At the top, there is a status bar with a question mark icon, a mobile phone icon, a 'Not connected' indicator, and a user profile icon labeled 'Unrestricted 1 UAT'. Below this is a header 'New Assessment'. The main content area has a light blue background with the text 'Enter the client's My Aged Care identifier to search for their client record' and an information icon. A text input field contains 'AC49733751' and a 'Search' button is to its right. Below the input field is a red error message box with an information icon: 'You are operating offline and it is not possible to match the client identifier that you entered with a client record. You can start an assessment while offline, but it cannot be uploaded until the client details that you enter are matched with a client record.' At the bottom of the screen is a 'Start Assessment' button.

After starting a local assessment, you will be required to complete all mandatory fields including assessment details and client details.

The screenshot shows the 'Add client' screen. At the top, there is a status bar with a question mark icon, a mobile phone icon, a 'Not connected' indicator, and a user profile icon labeled 'Unrestricted 1 UAT'. Below this is a header 'Add client'. The main content area has a white background with several form fields: 'Facility *' with a dropdown menu showing 'UAT Pitz RESI- HCP & STRC outlet'; 'Care Type *' with radio buttons for 'Permanent' and 'Respite'; 'Self-Referral Reason *' with radio buttons for 'New Permanent Resident' and 'Respite Resident'; 'Assessment Date' with a date input field showing '06/06/2024' and a calendar icon; 'Aged Care ID *' with a text input field containing 'AC49733751' and a '10/10' character count; and a checkbox labeled 'The resident has only one name'.



Once back online and connected to the internet, you will be required to match the local assessment with the correct Referral ID after commencing the assessment. This can be done when they have internet connectivity and selecting the **Matched client** button.

⚠ You will not be able to upload this assessment until the client details entered are matched to the correct client record using the MATCH CLIENT button

You are conducting a Self Referral Assessment

UAT Pitz RESI- HCP & STRC outlet
AC49733751

18% complete

Match Client

More options

Identification and assessment details

- Palliative Care
- Nursing
- Resource Utilisation Group - Activities of Daily Living
- Australia-modified Karnofsky Performance Status
- Frailty
- Braden Scale
- De Morton Mobility Index (DEMMI) - Modified
- Australian Modified - Functional Independence Measure
- Behaviour Resource Utilisation Assessment

Assessment Details

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

*** Care type**

Permanent

Respite

Assessment date

6 June 2024

*** Was PPE supplied by your organisation used?**

Yes

No

*** Is the Client receiving care in a Memory Support Unit?**

Yes

No

If the details do not match, you will need to go back and update the details to match or choose which details to use if the client ID is matched correctly. You will not be able to click **Confirm** unless the details are corrected.

Match the client's details

⚠ The client details that you entered in the assessment do not match with the client record.
Go back and check the details that you have entered and search again.

	Client details entered	Details from client record
First Name	Cole son	Coleson
Last Name	McLaughlin	McLaughlin
Date of Birth	24 November 1932	24 November 1932
Gender	Male	Male
SPARC ID		
ACMPS ID		

Confirm

Once the details match, select **Confirm**, and continue with the rest of the assessment.

Match the client's details

⚠ One or more of the client details entered do not match with the client record.

If this is not the correct client record, go back and check the details that you have entered and search again.

If you confirm that this is the correct client record, the client details entered will be overwritten with those from the client record.

	Client details entered	Details from client record
First Name	Coleson	Coleson
Last Name	McLaughlin	Mclaughlin
Date of Birth	24 November 1932	24 November 1932
Gender	Male	Male
SPARC ID		
ACMPS ID		

Confirm

22. Completing, re-opening and uploading assessments

22.1 Completing an assessment

If there are any pages that are incomplete or needs review, the progress bar will be under 100% and the page that has not been completed will not show a tick icon.

1. Select each of the pages that have an arrow to complete.

Nia Sharma
Connected
Unrestricted 1 UAT

UAT Pitz RESI- HCP & STRC outlet
AC67952275

73% complete

More options

- Identification and assessment details
- Palliative Care
- Nursing
- Resource Utilisation Group - Activities of Daily Living
- Australia-modified Karnofsky Performance Status
- Frailty
- Braden Scale
- De Morton Mobility Index (DEMMI) - Modified
- Australian Modified - Functional Independence Measure
- Behaviour Resource Utilisation Assessment
- Assessor comments form

RUG-ADL

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

***Bed Mobility**

1 - Independent or Supervision only
2 - (Not a valid option for this question)
3 - Limited physical assistance
4 - Other than two persons physical assist
5 - Two or more persons physical assist

***Toileting**

1 - Independent or Supervision only
2 - (Not a valid option for this question)
3 - Limited physical assistance
4 - Other than two persons physical assist
5 - Two or more persons physical assist

For further information, go to My Aged Care | www.myagedcare.gov.au | 1800 836 799

190

- If your input has contradicted a previous input in another tool, you will be shown the following warning. You will be able to choose to amend either the input that you have just created or the other contradicted input.

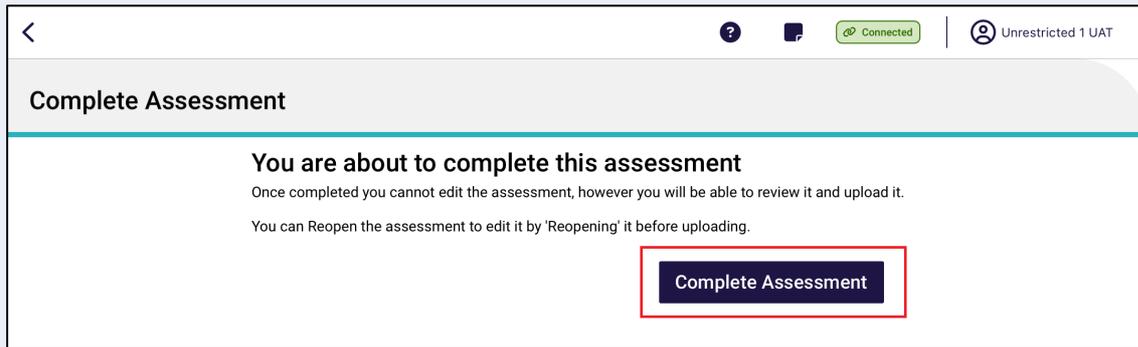
The screenshot shows the 'UAT Pitz RESI- HCP & STRC outlet' form for AC67952275. The progress bar indicates 91% completion. A warning message is displayed: 'The following warning conditions have been found. Please review them before continuing. Transfers - Toilet'. The form is currently on the 'AM-FIM' section, which includes 'Supervision' and 'Modified independence' scales. The 'Toilet' scale is set to 6, and the 'Tub or Shower' scale is set to 3. The 'Locomotion' scale is partially visible. The left sidebar shows various assessment categories, and the right sidebar has navigation icons.

Once all pages are complete (tick icons) and the progress bar is showing 100% completed, select **Complete** on the top right.

The screenshot shows the same form now at 100% completion. The progress bar is full green, and the 'Complete' button is highlighted with a red box. The form is on the 'Assessment Details' section, which includes 'Care type' (Permanent), 'Assessment date' (06/06/2024), and two questions: '* Was PPE supplied by your organisation used?' and '* Is the Client receiving care in a Memory Support Unit?'. The left sidebar shows all assessment categories with tick marks, and the right sidebar has navigation icons.

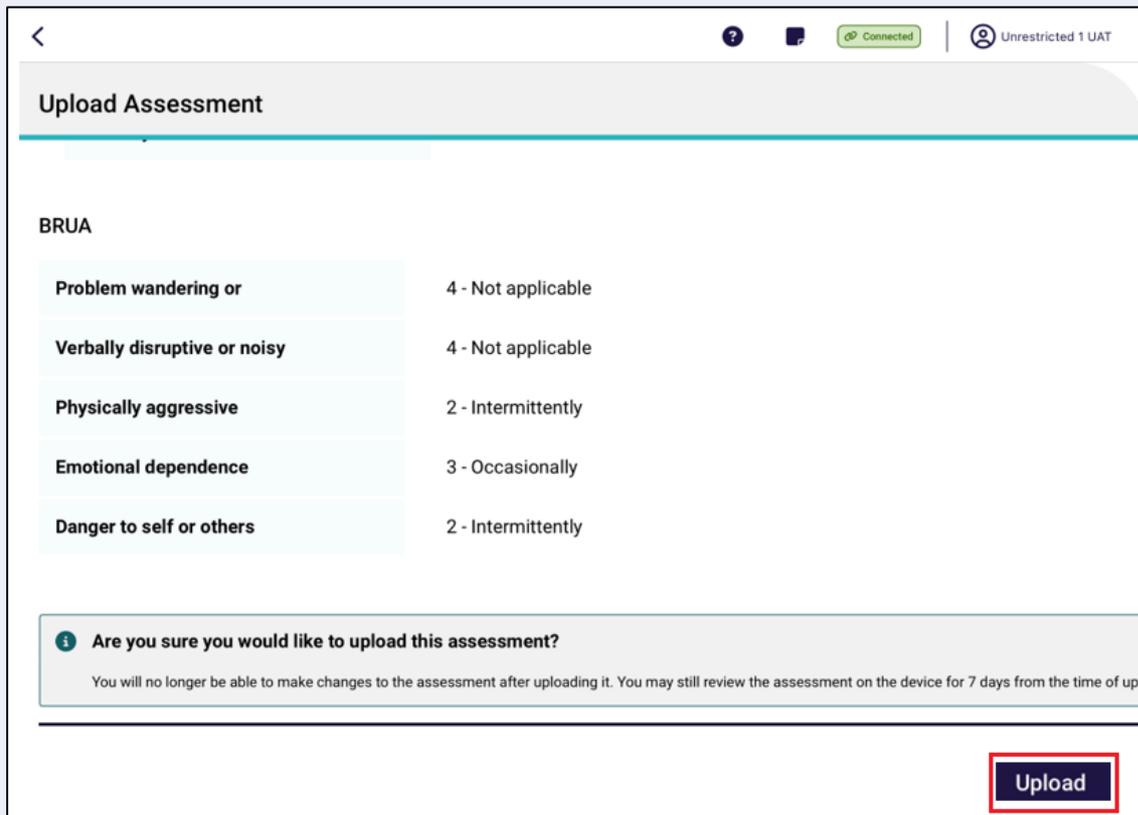


3. Select **Complete Assessment** again to confirm.



4. A summary of the assessment appears. Scroll to the bottom and then select **Upload**. The assessment will remain in the completed status until either the **Upload** button is pressed or automatically uploaded after 7 days.

After upload, the assessment will disappear from the **In-progress assessments** section of the main menu.



22.2 Re-opening a completed assessment

An assessment that has the status of **Completed** or **Uploaded** can be reopened, but only **Completed** assessments can be reopened for edits. Uploaded assessments can be reopened for view only.

1. To reopen a complete assessment, select the Facility, then select **Completed**. Select the assessment to reopen.



Unrestricted 1 UAT

Welcome Unrestricted 1 UAT

Referrals last synced 15:24 today

Facilities (AN-ACC)

Facility Name	Days Overdue	Not started	In progress	Completed
Edge Hill Orchards	372 days overdue	1	0	0
Gosling Creek Aged Care	277 days overdue	4	0	0
RFA Auto Facility	262 days overdue	2	0	0
UAT Pitz RESI- HCP & STRC outlet	248 days overdue	6	1	1

Buttons: Sync, No uploads pending, Quality Assurance, Backup Assessment

! Assessments with a 100% progress completed indicator will still appear in the **In-progress assessment** section of the main menu. These assessments are technically complete but is not officially in the Completed status until the **Complete Assessment** button is selected.

Dashboard UAT Pitz RESI- HCP & STRC outlet (6 Assessments)

Filters 6 assessments, sorted by First Name A-Z

Assessment Name	Days Overdue	Status
AGAntwon UATHayes	252 days overdue	Completed
AGLeonard UATLinnie	252 days overdue	Completed
AGMarlee UATColt	252 days overdue	Not started
Pridata UAT	256 days overdue	Urgent Not started

Buttons: Sync Referrals, New Assessment, Quality Assurance, Upload 2 Completed, Backup 2 Assessments

The selected assessment displays. Select **Reopen**.

AGLeonard UATLinnie

UAT Pitz RESI- HCP & STRC outlet AC08129645

100% complete

Buttons: Reopen, Upload, More options

Assessment Details

Identification and assessment details

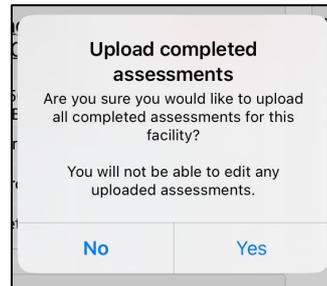
Palliative Care

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

- The completed assessment will be reopened for edits. It will need to go through the process for [Completing an assessment](#) again.

22.3 Re-opening an uploaded assessment

! Once the assessment has been uploaded you are unable to reopen and edit the assessment.



22.4 Uploading Assessments

RAC funding assessors can upload assessments once they are complete. The assessment will remain in the completed status until either the **Upload** button is pressed or automatically uploaded after 7 days. After upload, the assessment will disappear from the **In-progress assessments** section of the main menu and will move to the Uploaded section of the Facility's page.

! You must have an active internet connection to upload the assessment.

If you do not have an active internet connection, the completed assessment will be saved on your device for 7 days and uploaded when you enter an internet service area.

1. After completing the steps in [Completing an Assessment](#), a summary of the assessment appears. Scroll to the bottom and then select **Upload**.

2. After going to the Facility page and selecting **Completed**, all completed assessments can be uploaded at once by selecting **Upload [number] Completed**.



23. Removing Assessments and Clearing Assessment Data

- ! Removing an assessment from the device will permanently delete any assessment information recorded on that device.
- ! Completed but not yet uploaded assessments cannot be removed.
- ! Removing an uploaded assessment from your device does NOT remove the data from My Aged Care.

23.1 Removing an uploaded assessment

To remove an uploaded assessment:

1. Open the uploaded assessment that you wish to remove. See the [Find A Client](#) section for more details.
2. Select the **More options** button in the top right hand side.

The screenshot shows a mobile application interface for an assessment form. At the top, the user's name 'Nia Sharma' is visible, along with a 'Connected' status and 'Unrestricted 1 UAT' user type. The assessment title is 'UAT Pitz RESI- HCP & STRC outlet AC67952275' with a progress bar at 100% complete. A red box highlights a 'More options' button in the top right. The form is divided into a left sidebar with categories like 'Identification and assessment details', 'Palliative Care', 'Nursing', etc., and a main content area. The main area has a header 'Assessment Details' and a note: 'All fields marked with an asterisk (*) are required.' Below this are sections for 'Assessment details' and 'Client details'. The 'Assessment details' section includes 'Care type' (Permanent), 'Assessment date' (6 June 2024), and two questions: 'Was PPE supplied by your organisation used?' (No) and 'Is the Client receiving care in a Memory Support Unit?' (No). The 'Client details' section includes 'The resident has only one name' (No) and 'First name'.

3. Select **Remove assessment** from the pop-up. This will NOT remove the assessment data from the department's system.

The screenshot shows a pop-up menu with a 'Select an option' header. There are two options listed: 'Remove assessment' and 'Share referral details'. The 'Remove assessment' option is highlighted with a red rectangular box.



23.2 Removing an in-progress assessment

To remove an in-progress assessment:

1. Open the assessment that you wish to remove. Refer to the [Find A Client](#) section for more details.
2. Select the **More options** button in the top right corner of the app.

The screenshot shows the Pridata UAT app interface. At the top, it displays 'Pridata UAT' and 'Unrestricted 1 UAT'. The main header shows 'UAT Pitz RESI- HCP & STRC outlet AC98773435' and '82% complete'. A red box highlights the 'More options' button in the top right corner. The assessment form is titled 'DEMMI' and includes sections for 'Stand on toes', 'Tandem stand with eyes closed', 'Walking', and 'Walking independence'. The 'Walking' section is currently selected, showing 'Walking distance +/- gait aid' and 'Walking independence' options.

3. Select **Remove assessment** from the **Select an option** pop-up.

The screenshot shows a 'Select an option' pop-up menu with the following options: 'Clear page', 'Remove assessment', 'Reject referral', and 'Share referral details'. The 'Remove assessment' option is highlighted with a red box.

4. Select **Remove assessment** from the **Remove Assessment** pop up.

The screenshot shows a 'Remove Assessment' pop-up dialog with the following text: 'Remove Assessment', 'Are you sure you would like to remove the assessment from this device?', 'This cannot be undone.', 'Remove Assessment', and 'Go back'. The 'Remove Assessment' button is highlighted with a red box.

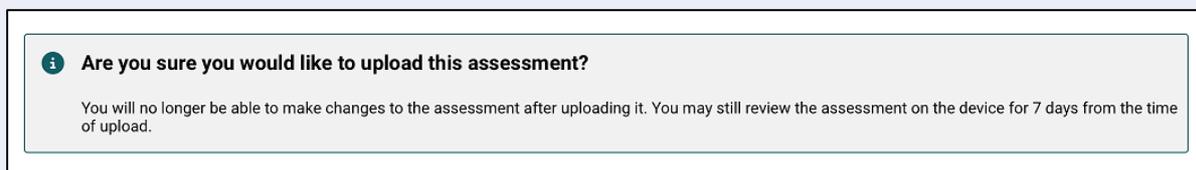
5. The assessment will be removed. If you choose the same client again from the Facilities



page, you will be prompted to start a new assessment. ALL data will have been removed.

23.3 Clear Uploaded and Not Started assessments

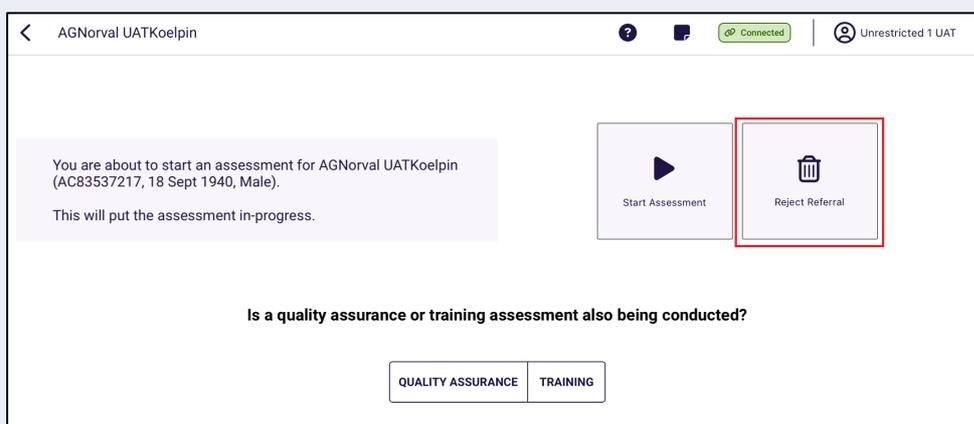
For not started or uploaded assessments, to clear them they will either require to be manually removed by following the steps set out in [Removing an uploaded assessment](#) or will automatically be removed 7 days after successfully uploading.



23.4 Rejecting a Referral

RAC funding assessors may reject a referral if a Resident is not available to be assessed. Please note that for self-referred assessments, you will not be able to reject the referral.

1. Go to the Resident's client card to display the Start Assessment screen. Then, select **Reject Referral**.



2. Select the reason for the rejection. Choose from **Client Deceased**, **Client Unavailable**, or **Other**. Please note that for **Residential Respite referrals** option of **Client has exited facility** will be available instead of **Client Unavailable**.



Reject AGNorval UATKoelpin's Referral

i Are you sure you would like to reject this referral?
All in progress assessments for this referral will be cancelled.

Referral status reason*

Client Deceased
Client Unavailable
Other

Reject Referral

a) Client Deceased

Select the client's deceased date if known, then select **Reject Referral**.

Reject AGNorval UATKoelpin's Referral

i Are you sure you would like to reject this referral?
All in progress assessments for this referral will be cancelled.

Referral status reason*

Client Deceased
Client Unavailable
Other

Client Deceased Date (if known) *

📅

⚠️ Cancelling this referral with the reason of Deceased will set the client record in MyAgedCare system to Deceased which will prevent future use of the record.
You should only proceed with this action if you are confident that the referral is for a deceased individual.

Reject Referral

b) Client Unavailable

Client unavailable should be selected if the client is currently unavailable for some reason, for example is in hospital but is expected to return to the service or facility at some point of time in the future. Select **Reject Referral**.



Reject AGNorval UATKoelpin's Referral

Are you sure you would like to reject this referral?
All in progress assessments for this referral will be cancelled.

Referral status reason*

Client Deceased

Client Unavailable

Other

Reject Referral

c) Client has exited facility

This option is available for Residential Respite referrals only. Select **Reject Referral**. This option will transfer the referral to an assessment organisation at the client's registered home address.

Reject MMO'Conner NDEve's Referral

Are you sure you would like to reject this referral?
All in progress assessments for this referral will be cancelled.

Referral status reason*

Client Deceased

Client has exited facility

Other

Reject Referral

d) Other

If the assessment cannot be completed for any other reason, select **Other** and enter the reason in the textbox. You must enter a reason in **Rejection reason** before you will be able to reject the referral. Then, select **Reject Referral**.

An example of this would be if the resident has returned to their home in the community.



<
Connected
Unrestricted 1 UAT

Reject AGNorval UATKoelpin's Referral

i Are you sure you would like to reject this referral?
All in progress assessments for this referral will be cancelled.

Referral status reason *

Client Deceased

Client Unavailable

Other

Rejection reason *

Rejection reason comment here. 30/500

Reject Referral

24. Appendices

24.1 Sideloaded App for Organisations

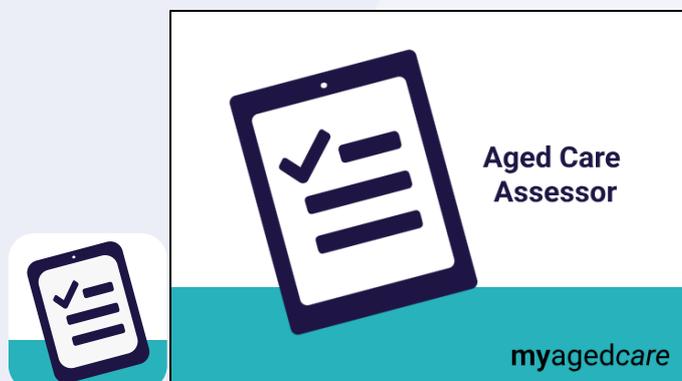
Some organisations who would like to use the App on a Windows device outside the Windows App Store, via a manual installation process with a downloaded installation file known as sideloading. The app files for Windows are available to sideload onto a Windows device running Windows 10 or above. This is to allow for businesses that have a restricted IT environment to install the app without going through the [Microsoft Store](#).

Download the [sideloaded App](#) from the department's website.

My Aged Care recommends the use of the [Microsoft sideloading documentation](#) to install the app.

The suffix of the version number ends with a number one. For example: v30.0.0.1

The icon and splash screen for the Aged Care Assessor app appears as follows:



Upcoming releases

Unlike apps in the Microsoft Store, Apple App Store and Android Play Store which include



automatic updates, Sideloaded apps have no automatic updates, therefore each sideload version update will require a manual installation.

The department will notify assessment organisations of a new release at least 2 weeks prior to the release of the application. They will also be notified when the new version is available and by what date all their users should be using the new version of the app.

Frequently Asked Questions

- When do I need to install the new release of the app onto my organisation's devices?

The new version of the app should be installed on your users' devices within 1 week from the release of the new version. Once the new release of app has gone live, users will not be able to begin any new assessments until they have been upgraded to the latest version.

- How will my organisation's sideloaded app users be supported by the department?

If you have installed the Aged Care Assessor App via the sideloading method, the department will continue to support users for issues within the application. We may refer you to contact your organisation's IT area if we believe the issue is related to your organisation's setup.

- What happens if I don't upgrade my sideloaded app to a new version when it is released?

When a user doesn't accept the updated version of the App from the Microsoft Store, they will not be able to download or access any new referrals on their device. This same restriction will happen for users who have sideloaded the application and don't have the latest version available.

- What should I do if I have any issues with using my sideloaded app?

Please email your organisation's IT area and include: description of the issue, screenshot/s of the issue, and description of where the issue is during your assessment or other use of the app.

24.2 End-of-Life Pathway

An assessor can choose to flag that a client is using the End-of-Life pathway. This is available at the following times:

- during referral and self-referral
- before triage
- before assessment starts
- during the assessment
- before the support plan review starts
- during the support plan review.

For Transitioned Home Care Package clients that were flagged on the End-of-Life pathway but no longer requires it, assessors can revert this decision, back to the previous Transitioned Home Care Package classification.

To flag the End-of-life pathway:

1. Select the 'Flag End-Of-Life' option during referral. Alternatively select the 'Flag End-of-life Pathway' button before triage, before assessment starts, and at the start of support plan review.

During Referral

Lam Mary's Details

→ About

→ Event Summary and Approvals

→ Refer for Assessment

Refer Lam Mary for Assessment

A Home Support Assessment referral will be created for the client.

Select an outlet for referral

GRAZIER AGED CARE - ACA - ACT

*** Select an assessment type:**

Home Support Assessment

Priority:

High

*** Reason for self referring:**

End-of-Life Pathway

Done

Remote Assessment
Homeless or at risk of
Vulnerable groups

End-of-Life Pathway

Before Triage

Lam Mary, AC37211299, born 28 December 1928, 96 Years.

Select an option to see more information.

Start Triage

Refer urgent services

Remove from device

Flag End-of-Life Pathway

Assessment Consent

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

The flag is also available when the IAT assessment is finalised and during the support plan review, by selecting **More Options** and then selecting **Flag End-of-life pathway**.



2. The End-of-Life Pathway page appears.

In here you can:

- select the tickbox to start the End-of-life pathway. This will also set the priority to High (Or Urgent for Support Plan reviews)
- attach the End of Life Form, and/or others
- validate End-of-life forms, and select the form verification status
- add details as free text.

Select **Confirm** to finalise the pathway.

! Assessors must verify End-of-life documentation before submitting the Support Plan or Support Plan Review for delegate decision.

3. Assessors can also attach End-of-life documentation at the **Attachments** page of the Client Record.

Select the **Add an attachment** button.

There are two types of attachments available: End of Life Form, and End of Life – Other.

When attached successfully, go to the client's Attachments screen, then to the attachments section, to view them.

The screenshot shows the 'Attachments' section for a client named 'Younger Bob'. The left sidebar contains navigation options: Client Profile, Contact Details, Support Network and Cohabitants, Wallet check, Event summary and Approvals, Attachments (highlighted with a red box), and Notes. The main content area is titled 'Attachments' and includes a note: 'All fields marked with an asterisk (*) are required.' Below this is a red-bordered button labeled 'Add an attachment' with a plus icon, followed by the text 'You can add attachments up to 5 MB'. There are two tables: 'Assessment Attachments - 0 Files' and 'Other Attachments - 1 Files'. The 'Other Attachments' table has the following data:

State	Attachment name	Expiry	Type
Unavailable	EOL.docx	-	End of Life Form

4. Assessors can also validate End-of-life documentation at the following times:

- before triage
- before assessment starts
- during the support plan
- during support plan review.

For before triage or before assessment starting, validate by selecting the **Validate End-of-Life documents** button.

The screenshot shows the 'Assessment consent' screen for a client named 'Jonah Jameson, (AC48573895), born 1 July 1936, 88 Years.' The screen prompts the user to 'Select an option to see more information.' There are four buttons: 'Start Assessment' (checkmark icon), 'Refer urgent services' (warning triangle icon), 'Remove from device' (trash can icon), and 'Validate End-of-Life documents' (plus sign icon, highlighted with a red box). The 'Assessment consent' title is at the bottom.

If the IAT assessment is finalised or you are during the support plan review, you can select **More Options**, then select **Validate End-of-Life Pathway**.



Client Assessment Support Plan Upload Quick notes More options

You are conducting a Self Referral Assessment

Triage Assessment Details Reason for assessment Carer profile Medical and Medications Function Physical, Personal Health and Frailty Social Cognition Behaviour

Triage Assessment options

Remove Client from Device

Cancel Assessment

Validate End-of-Life Pathway

Date of Tri 14 April 20

Registrat

Client Client's carer, family member and/or other

Client's representative/supporter Client's General Practitioner

Representative of service provider Health professional

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

- Once the End-of-Life pathway is finalised, the assessor's dashboard will show an **End of life** badge.

Welcome John Wick

Referrals last synced 09:10 today

Assessment outlet

Jim's Assessment Outlet		Careful Assessments	
Triage not started	0	Triage not started	2
Urgent Services Pending Triage	0	Urgent Services Pending Triage	0
Triage In Progress	1	Triage In Progress	3
Assessment Not Started	3	Assessment Not Started	1
Assessment In Progress	2	Assessment In Progress	0
SPR In Progress	1	SPR In Progress	0
SPR Not Started	0	SPR Not Started	1

End of Life

Sync referrals Backup assessments New assessment Find a client

- You can use the 'End of life' keyword whilst searching for clients and assessments. There will be an **End of Life** badge associated with the Client Record. All End-Of-Life flagged assessments and support plan reviews have a High priority.





Connected

Sheldon Cooper

Filter 3 assessments, sorted by Client Last Name

Keyword

End of Life

Order

Client Last Name

Status

Priority

Assessment type

Clear filters

Jeff Goldblum

End of Life High priority

Aged Care ID	AC123456789
Assessment type	Comprehensive Assessment
Assessment status	In Progress
Finalised Support Plan due by	18/9/2023 (Due in 10 days)

Charles Mercy

FNAO End of Life High priority

Aged Care ID	AC24683579
Assessment type	Home Support Assessment
Assessment status	Triage In Progress
Completed Triage Due by	21/9/2023 (Due in 12 days)

Jessica Jones

End of Life High priority

Aged Care ID	AC04579375
Assessment type	Comprehensive Assessment
Assessment status	Triage Completed
Finalised Support Plan due by	10/9/2023 (2 days overdue)

- Sync referrals
- Backup assessments
- New assessment

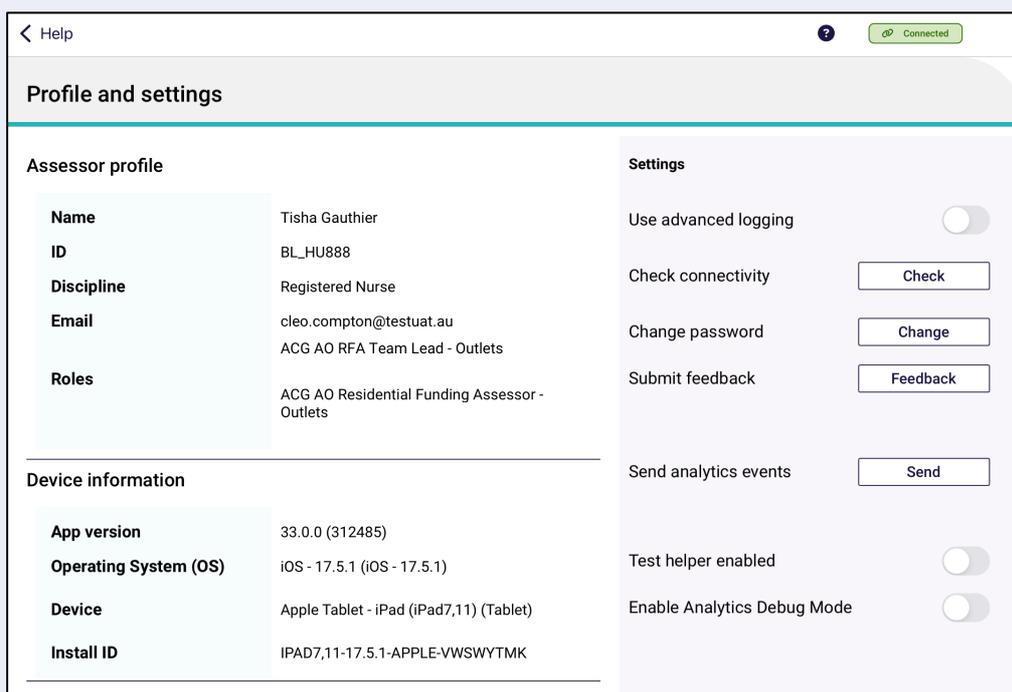


24.3 Troubleshooting and diagnostics

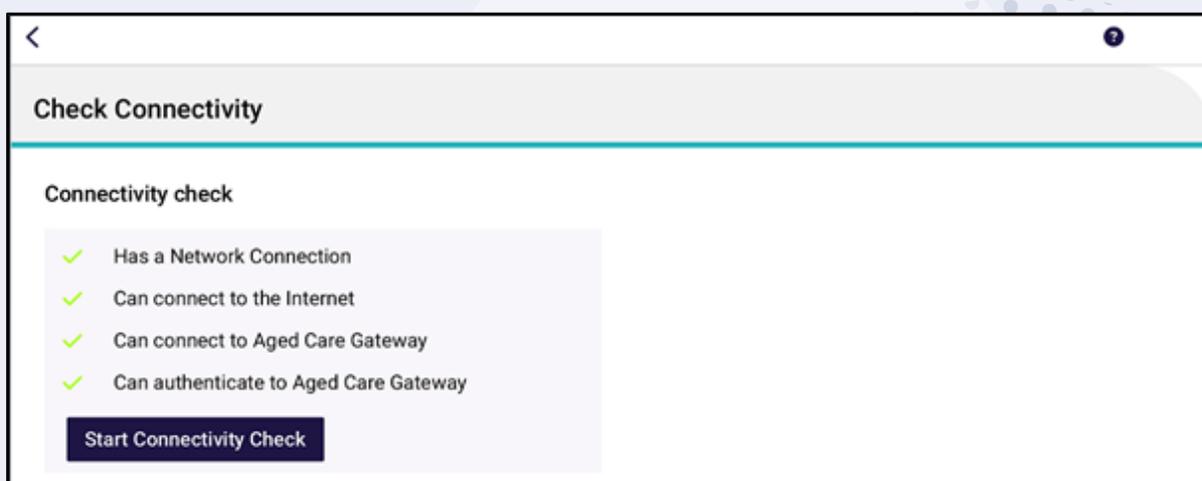
The troubleshooting and diagnostics functionality assists the My Aged Care service provider and assessor helpline with diagnosis and resolution of issues in coordination with the support teams in the Department of Health, Disability and Ageing. These functions are accessed from the **Profile** icon on top of the navigation menu.



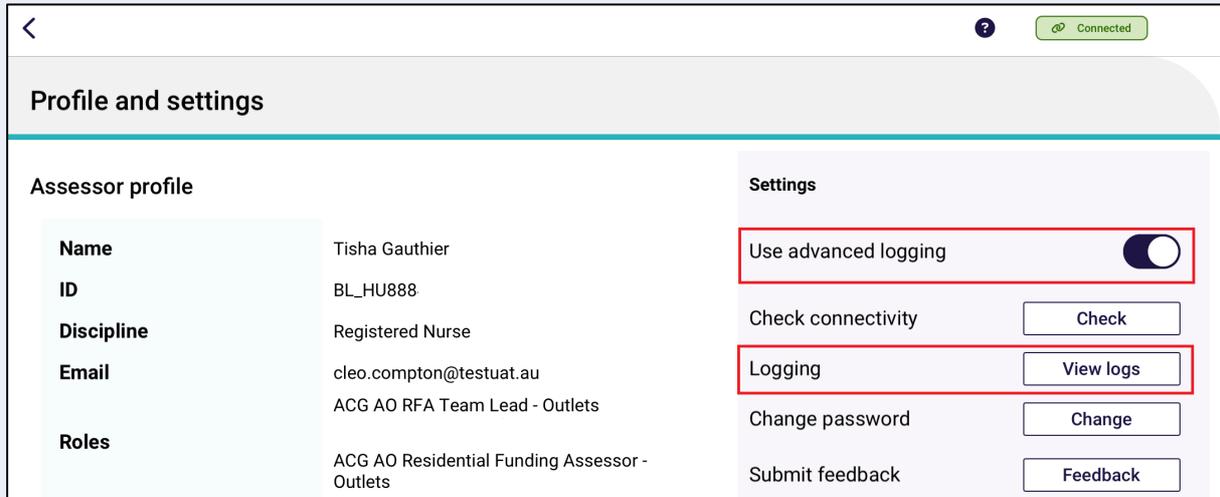
Information about the current downloaded version of the Aged Care Assessor App is displayed, and assessors can also **Check connectivity**, Change password, Use advanced logging or **Submit feedback** from this screen.



If you experience connection issues whilst using the App, you can check for issues by selecting **Check connectivity**. Any connection issues will be displayed. There are also quick suggestions provided to help with connectivity issues. Proxy settings can also be updated if it is a requirement from your organisation.



If you experience technical issues whilst using the App, you can choose to share your App device logs and diagnostics. This will assist the support teams to more easily identify, analyse, diagnose and resolve any issues. To do so, toggle 'Use Advanced Logging'. This will display the View Logs button.



The logs contain detailed information regarding the specific problem, and traceable steps that have been taken to reach the problem point. This information will be able to be accessed by the department for diagnosis.

