

Assessor Portal User Guide 11 - Assessment Delegate Support Role

The Delegate Support role in the My Aged Care assessor portal (assessor portal) enables anyone assigned the role to perform administrative functions to support the Assessment Delegate. For example, the Assessment Delegate Support will be able to print support plans, as well as generate, print and upload referral code letters and approval letters. The Assessment Delegate Support operates under the instructions of the Assessment Delegate.

Clinical Assessment Delegates are able to approve an older person for all service groups, classification types and classification levels under the *Aged Care Act 2024*. Non-clinical assessment delegates are restricted to approving entry level home support, Assistive Technology (AT) or Home Modification (HM) services (i.e. with classification levels of CHSP class, AT CHSP or AT-HM).

! 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 guidance on the interim process explaining **Manual Delegate Approval for CHSP only** for **comprehensive** and **home support assessments**, and how it impacts Clinical and Non-clinical Assessment Delegates from 1 November 2025, refer to *Manual Delegate Approval for CHSP – Standard Operating Procedure* and instructional videos for comprehensive and home support assessments.

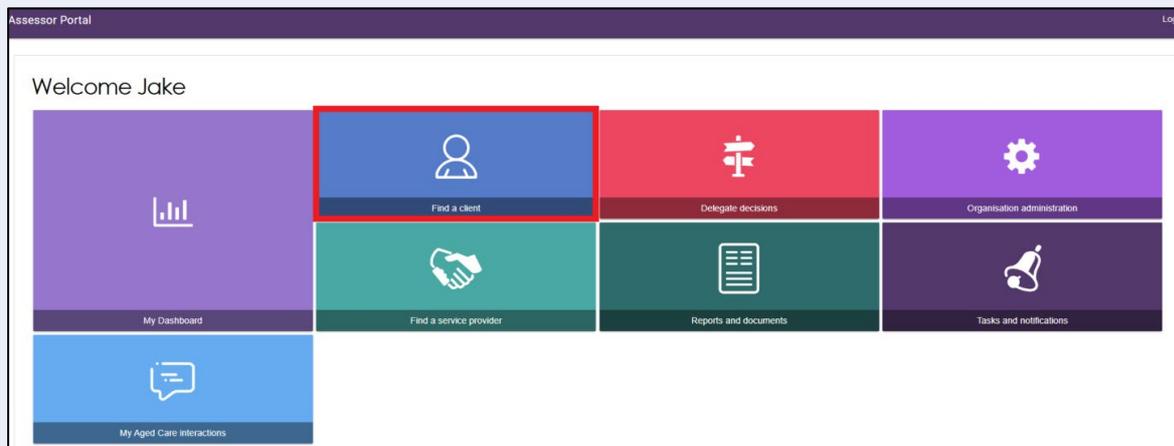
Note: This process was updated to align with recent changes effective from 23 February, the updated approach now applies.

This guide contains the following topics:

Accessing client information	2
Printing the support plan and generating referral code letters	4
Notice of Decision Letters	5
Uploading Approval Letters	5
Uploading Non-Approval Letters	10

Accessing client information

1. To locate information about a client and print a copy of the client record, select the **Find a client** tile from your homepage.

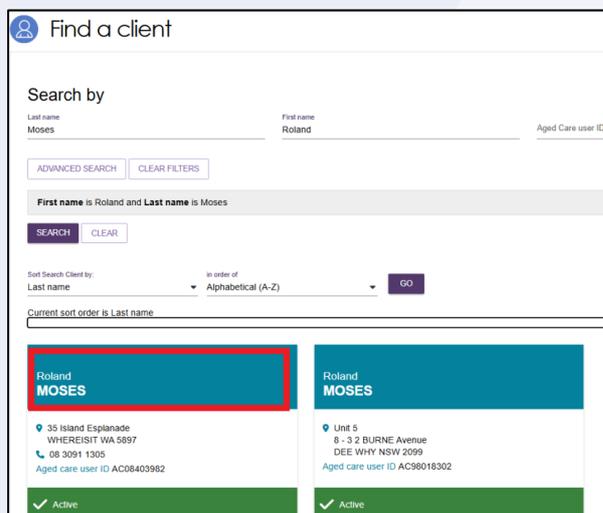


2. Use the **Find a client** function to search for the client. Client records you have recently viewed will appear in the **Recently Viewed Persons** section, and depending on your browser, this will either appear on the right side or the bottom section of the page.

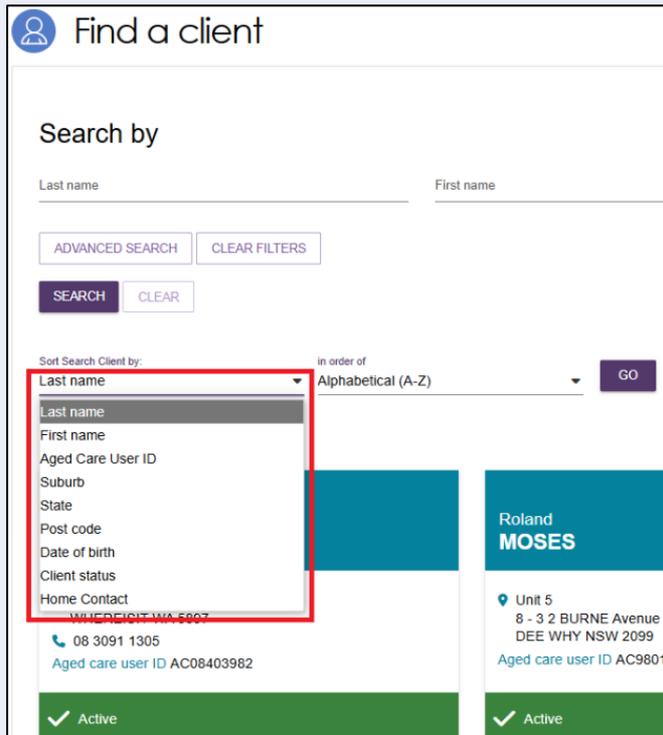
The **ADVANCED SEARCH** functionality allows you to search by additional fields. Refer to the [My Aged Care – Assessor Portal User Guide 1 – Registering and referring clients](#) for more information on using this functionality.



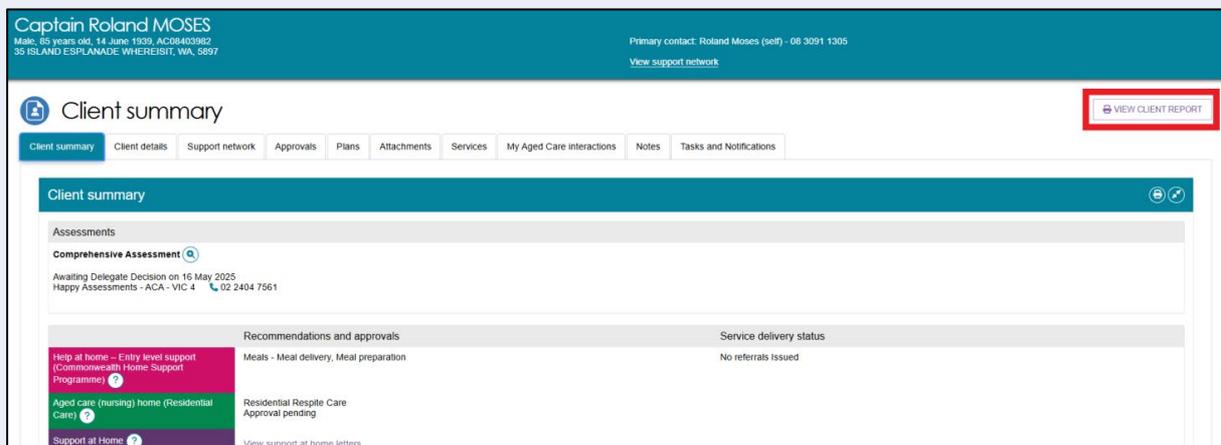
3. Any matching search results will be displayed. Select the client's name.



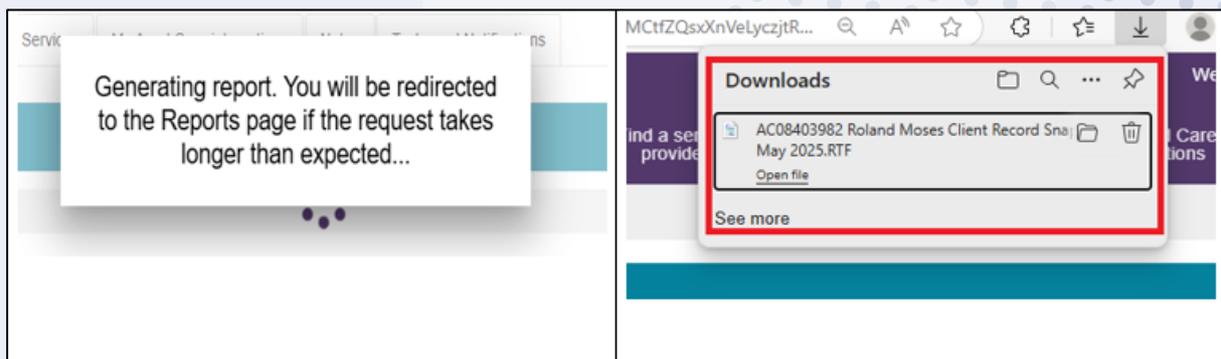
- You will be able to sort the matching results by a number of criteria including last name, first name, Aged Care User ID, suburb, state, post code, date of birth and more. Select the criteria, the order of display as required and select **GO**.



- Selecting the client's name tile will take you to the Client Summary. You can view and print a RTF (Rich Text File) of the client record by selecting the **VIEW CLIENT REPORT** button.



- A **Generating Report** pop up appears, then the Rich Text File (RTF) appears on your browser ready to be downloaded or opened.



3. Navigate to the **Manage services & referrals** tab. From here, you can view the client's service referrals and generate a copy of the referral code letter.

The screenshot shows the 'Support plan and services' page for Captain Roland MOSES. The 'Manage services & referrals' tab is highlighted. Under 'Services not yet in place', there are two sections: 'Help at Home' and 'Aged Care Homes'. The 'Meals' section under 'Help at Home' shows a status of 'Low' and 'Not actioned'. The 'Aged Care Homes' section shows a status of 'High' and 'Not actioned'.

Notice of Decision Letters

The Delegate Support can upload the Notice of Decision (NoD) letter, after the delegate decision is completed. This applies to both Approval letters and non-Approval letters.

NoD Letters are also sent to any of the older person's registered supporters (except for supporters-lite). Refer to [My Aged Care – Assessor Portal User Guide 2 – Registering support people and adding relationships | Australian Government Department of Health, Disability and Ageing](#) for more information.

! For CHSP only approvals: From 1 November 2025, there are manual changes introduced to the process for generating and uploading the Notice of Decision (Approval) letter for CHSP only for comprehensive assessments.

For more information, please refer to *Support at Home – Manual Delegate Approval for CHSP – Standard Operating Procedure* and instructional videos for comprehensive assessments.

Note: This process was updated to align with recent changes effective from 23 February, the updated approach now applies.

Uploading Approval Letters

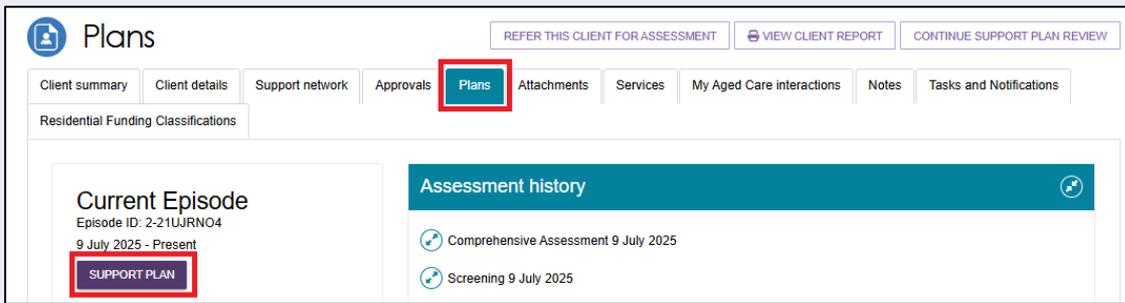
Once the Assessment Delegate has signed the letter, you can use the **Upload approval letter** button in the **Decisions** tab of the support plan to upload the letter to the client's record. Alternatively, you can upload this by using the **Add An Attachment** button in the **Attachments** tab on the client record.

For CHSP only recommendations, NoD letters can also be uploaded from the Goals & Recommendations tab.

From the support plan

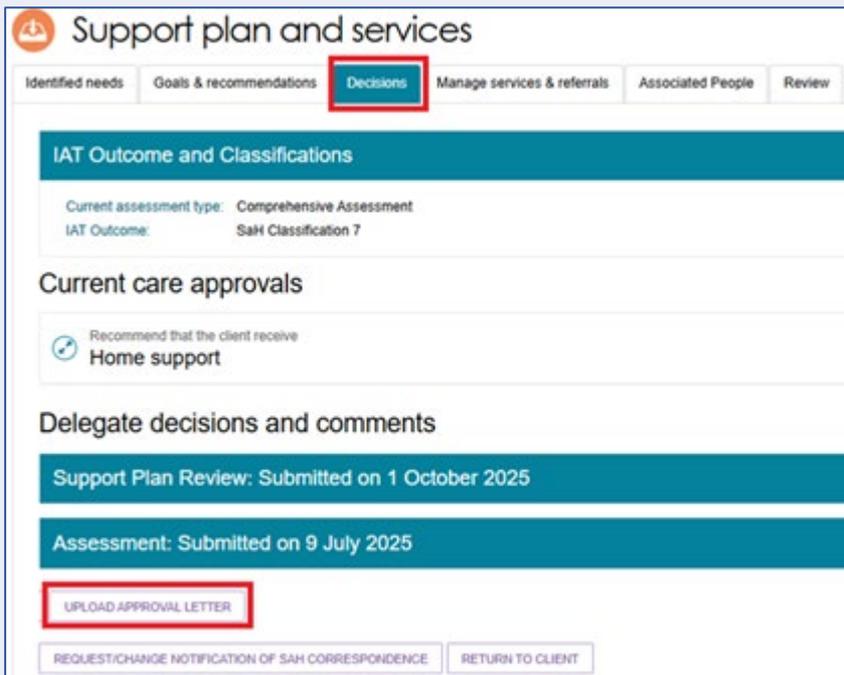
1. Go to the Client's profile and select the **Plans** tab. In the Plans page select the **Support Plan** button.



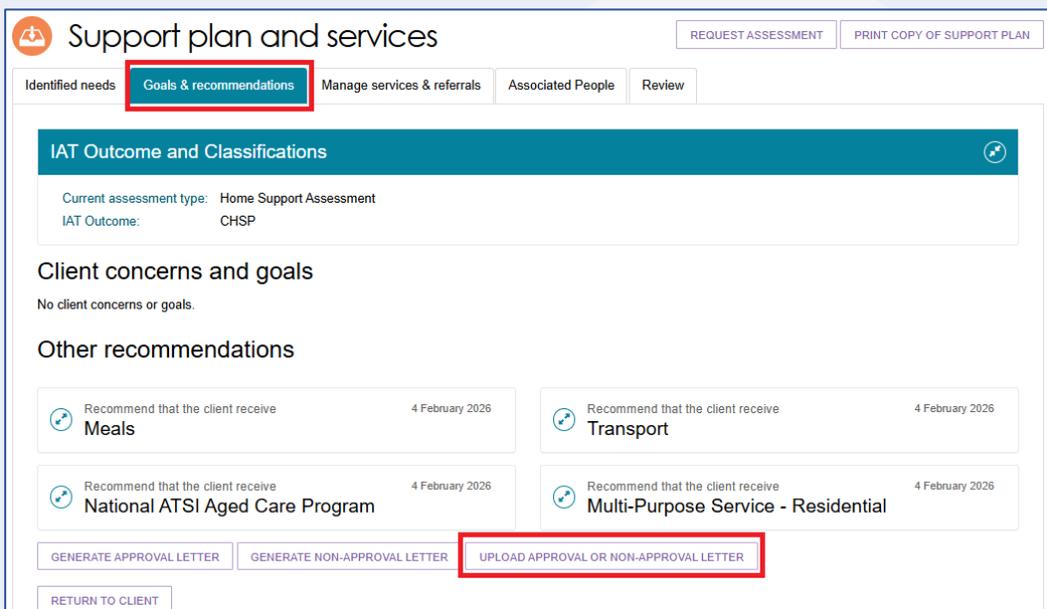


2. The Support Plan and Services page appears.

Select the **Decisions** tab, then Select **Upload Approval Letter** from the bottom of the page, underneath **Delegate decisions and comments**.



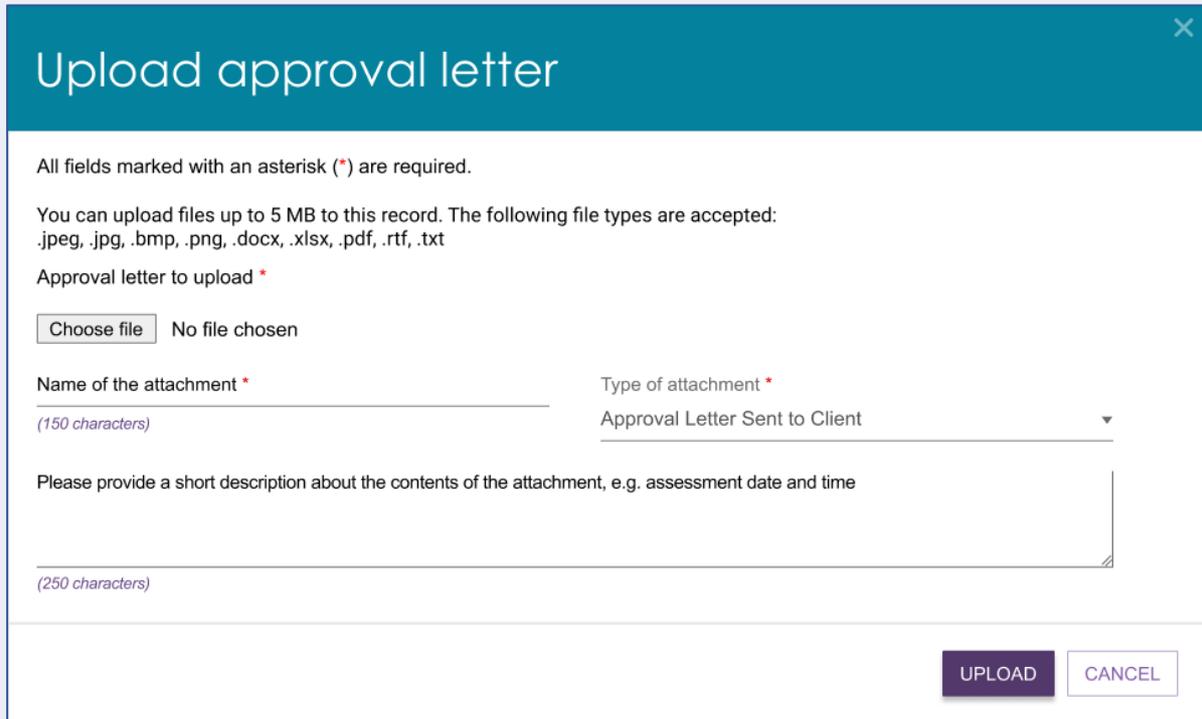
Alternatively, select the **Goals & Recommendations** tab, then select **Upload Approval or Non-approval letter** for CHSP only recommendations.



3. The Upload Approval Letter pop up appears (or 'Upload approval or non-approval letter', for CHSP only recommendations).

Choose the approval letter file to upload. Enter the name of the attachment. Ensure the attachment type is 'Approval letter sent to client'. Optionally provide a short description about the contents of the attachment.

Finally, select **UPLOAD**.

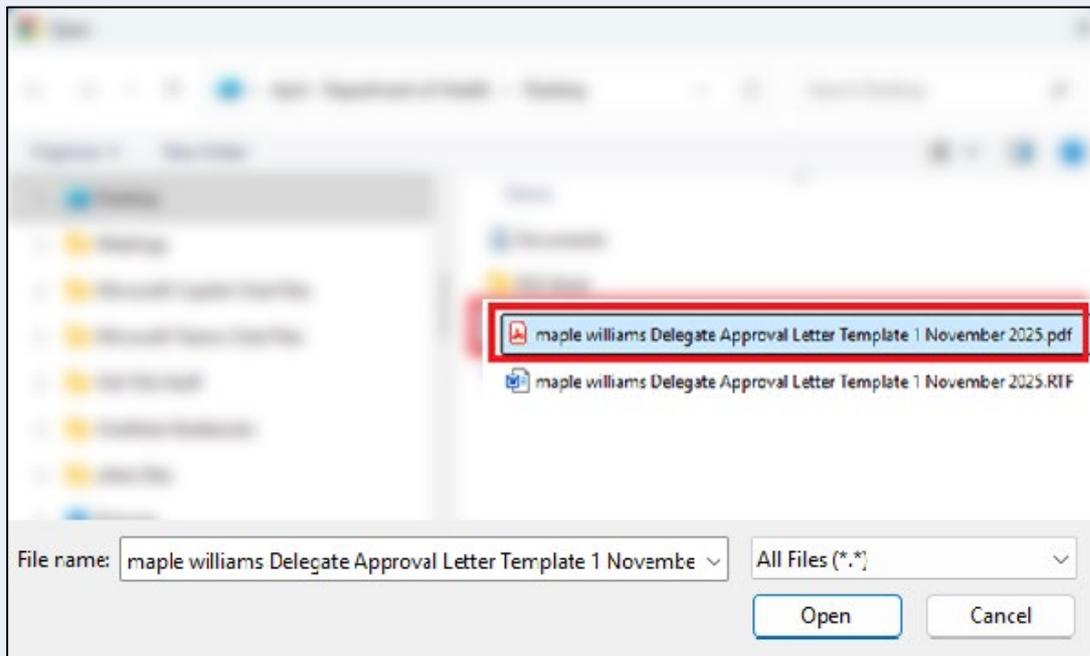


The screenshot shows a modal window titled "Upload approval letter" with a close button in the top right corner. Below the title, there is a note: "All fields marked with an asterisk (*) are required." This is followed by instructions: "You can upload files up to 5 MB to this record. The following file types are accepted: .jpeg, .jpg, .bmp, .png, .docx, .xlsx, .pdf, .rtf, .txt". The form contains the following fields:

- "Approval letter to upload *": A button labeled "Choose file" and the text "No file chosen".
- "Name of the attachment *": A text input field with a "(150 characters)" character limit.
- "Type of attachment *": A dropdown menu currently set to "Approval Letter Sent to Client".
- A text area for a description with the prompt "Please provide a short description about the contents of the attachment, e.g. assessment date and time" and a "(250 characters)" character limit.

At the bottom right of the form are two buttons: "UPLOAD" (in a dark purple box) and "CANCEL" (in a white box with a purple border).

4. Choose the letter and then select **Open**.



5. The letter name will appear next to the Choose File button.
Select **Upload**.

Upload approval letter

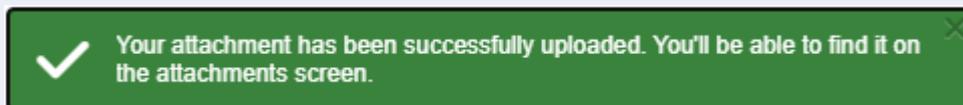
All fields marked with an asterisk (*) are required.

Approval letter to upload *

CHOOSE FILE maple willi...r 2025.pdf

UPLOAD CANCEL

- A success message appears saying that the attachment is now uploaded onto the Attachments page of the client record.



From the attachments tab

Alternatively, you can upload the letter by using the **Add An Attachment** button in the **Attachments** tab on the client record:

- Select the client's record and go to the **Attachments** tab. Then, select **Add An Attachment**.

Attachments

REFER THIS CLIENT FOR ASSESSMENT VIEW CLIENT REPORT CONTINUE SUPPORT PLAN REVIEW

Client summary Client details Support network Approvals Plans Attachments Services My Aged Care interactions Notes Tasks and Notifications

Residential Funding Classifications

Attachments

ADD AN ATTACHMENT

Assessment Attachments Other Attachments Correspondence

No attachments found to be displayed.

- Select **Choose File**

Add an attachment

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

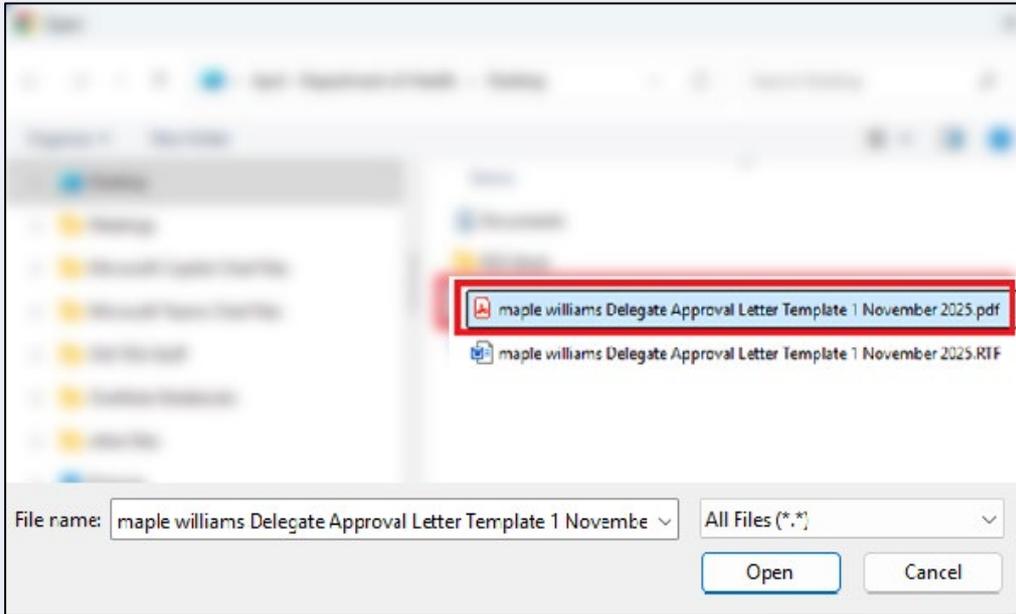
All fields marked with an asterisk (*) are required.

You can upload files up to 5 MB to this record. The following file types are accepted: .jpeg, .jpg, .bmp, .png, .docx, .xlsx, .pdf, .txt *

CHOOSE FILE No file chosen

- Select the approval letter and then select **Open**.

! The system supports a maximum file size of 5MB.
Only the following file types are accepted: jpeg, jpg, bmp, png, docx, slsx, pdf, or txt.
The approval letter will automatically download as Rich Text Format (rtf), which means you will need to convert to one of the above accepted file types prior to uploading.



4. The attachment's name will display next to the Choose File button.

Next, enter the Name of the attachment, and select the Type of attachment as **Approval Letter Sent to Client**.

Optionally you can provide a short description about the contents of the attachment such as assessment date and time.

Then, select **Upload**.

Add an attachment

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

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

You can upload files up to 5 MB to this record. The following file types are accepted: jpeg, jpg, .bmp, .png, .docx, .xlsx, .pdf, .txt *

CHOOSE FILE maple williams Delegate Approval Letter Template 1 November 2025.pdf

Name of the attachment: * Maple Williams Delegate Approval Letter 1 November 2025
Type of attachment * Approval Letter Sent to Client

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

UPLOAD CANCEL

5. The letter now appears under the **Assessment Attachments** tab of the **Attachments** page.



Home | Find a client | maple WILLIAMS

maple WILLIAMS
 Female, 75 years old, 5 September 1950, AC72685944
 Lot Number 5 ELDON STREET INDOOROOPILLY, QLD, 4068

Primary contact: maple williams (self)
 No support relationships recorded

Attachments REFER THIS CLIENT FOR ASSESSMENT VIEW CLIENT REPORT CONTINUE SUPPORT PLAN REVIEW

Client summary Client details Support network Approvals Plans **Attachments** Services My Aged Care interactions Notes

Tasks and Notifications Residential Funding Classifications

Attachments

ADD AN ATTACHMENT

Assessment Attachments Other Attachments Correspondence

Approval Letter Sent to Client 4 November 2025
 Maple Williams Delegate Approval Letter 1 November 2025 [pdf 311.38KB] HIDE FROM VIEW

Support Plan - External 14 July 2025
 AC72685944__2-21UJRNPT-Finalised-20251407092811.pdf [65.18KB]

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✓ Your attachment has been successfully uploaded. You'll be able to find it on the attachments screen.

Australian Government Department of Health and Aged Care myagedcare

Uploading Non-Approval Letters

Once the Assessment Delegate has signed the letter, you can use the **Upload Non-Approval letter** button in the **Decisions** tab of the support plan to upload the letter to the client's record. Alternatively, you can upload this by using the **Add An Attachment** button in the **Attachments** tab on the client record.

For Comprehensive assessments, uploading non-approval letter buttons are only available for No Care Approval (or similar).

For CHSP only recommendations, NoD letters can also be uploaded from the Goals & Recommendations tab.

From the support plan

1. Go to the Client's profile and select the **Plans** tab. In the Plans page select the **Support Plan** button.

Plans REFER THIS CLIENT FOR ASSESSMENT VIEW CLIENT REPORT CONTINUE SUPPORT PLAN REVIEW

Client summary Client details Support network Approvals **Plans** Attachments Services My Aged Care interactions Notes Tasks and Notifications

Residential Funding Classifications

Current Episode
 Episode ID: 2-21UJRN04
 9 July 2025 - Present
 SUPPORT PLAN

Assessment history

- Comprehensive Assessment 9 July 2025
- Screening 9 July 2025

2. The Support Plan and Services page appears.



Select the **Decisions** tab, then Select **Upload Non-Approval Letter** from the bottom of the page, underneath **Delegate decisions and comments**.

Support plan and services PRINT COPY OF SUPPORT PLAN

Identified needs **Decisions** Manage services & referrals Associated People Review

IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment
IAT Outcome: SaH Classification 6

Current care approvals

Delegate decisions and comments

Assessment: Submitted on 5 February 2026

Decisions

No Change to Existing Care Approvals
Priority for this care type: High
Approval starts: 5 February 2026
Agreed

Recommend that the client receive
Home support

Decision date (Assessment)
5 February 2026 12:00 AM (Australian Eastern Standard Time)

GENERATE NON-APPROVAL LETTER **UPLOAD NON-APPROVAL LETTER**
REQUEST/CHANGE NOTIFICATION OF SAH CORRESPONDENCE RETURN TO CLIENT

Alternatively, select the **Goals & Recommendations** tab, then select **Upload Approval or Non-approval letter** for CHSP only recommendations.

Support plan and services REQUEST ASSESSMENT PRINT COPY OF SUPPORT PLAN

Identified needs **Goals & recommendations** Manage services & referrals Associated People Review

IAT Outcome and Classifications

Current assessment type: Home Support Assessment
IAT Outcome: CHSP

Client concerns and goals
No client concerns or goals.

Other recommendations

Recommend that the client receive
Meals 4 February 2026

Recommend that the client receive
Transport 4 February 2026

Recommend that the client receive
National ATSI Aged Care Program 4 February 2026

Recommend that the client receive
Multi-Purpose Service - Residential 4 February 2026

GENERATE APPROVAL LETTER GENERATE NON-APPROVAL LETTER **UPLOAD APPROVAL OR NON-APPROVAL LETTER**
RETURN TO CLIENT



3. Select **Choose File** at the pop up that appears.

Upload non-approval letter

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

You can upload files up to 5 MB to this record. The following file types are accepted:
.jpeg, .jpg, .bmp, .png, .docx, .xlsx, .pdf, .rtf, .txt

Non-approval letter to upload *

Choose file No file chosen

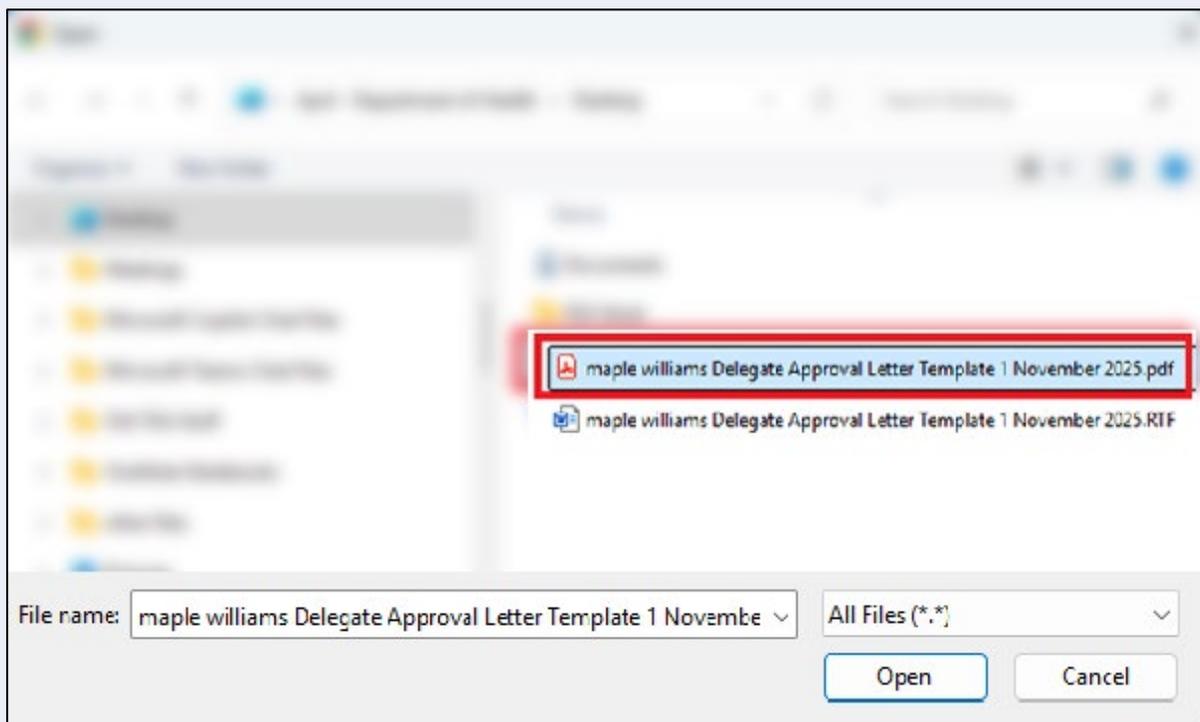
Name of the attachment * (150 characters)

Type of attachment * Non-Approval Letter to Client

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

UPLOAD CANCEL

4. Choose the letter and then select **Open**.



5. The letter name will appear next to the Choose File button.
Enter the name of the letter. Ensure the type of attachment is 'Non-Approval Letter to Client'. Optionally you can provide a short description about the contents of the letter.
Finally, select **UPLOAD**.

Upload non-approval letter ✕

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

You can upload files up to 5 MB to this record. The following file types are accepted:
 .jpeg, .jpg, .bmp, .png, .docx, .xlsx, .pdf, .rtf, .txt

Non-approval letter to upload *

FileName.rtf

Name of the attachment * Type of attachment *

(150 characters) Non-Approval Letter to Client ▾

Please provide a short description about the contents of the attachment, e.g. assessment date and time

(250 characters)

6. A success message appears saying that the attachment is now uploaded onto the Attachments page of the client record.



From the attachments tab

Alternatively, you can upload the letter by using the **Add An Attachment** button in the **Attachments** tab on the client record:

1. Select the client's record and go to the **Attachments** tab. Then, select **Add An Attachment**.

Attachments

Client summary

Client details

Support network

Approvals

Plans

Attachments

Services

My Aged Care interactions

Notes

Tasks and Notifications

Residential Funding Classifications

Attachments

ADD AN ATTACHMENT

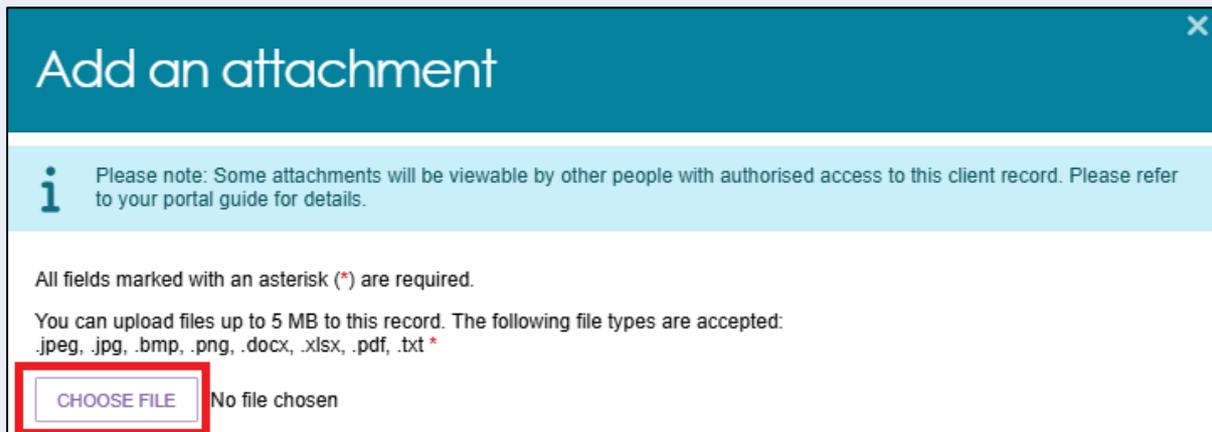
Assessment Attachments

Other Attachments

Correspondence

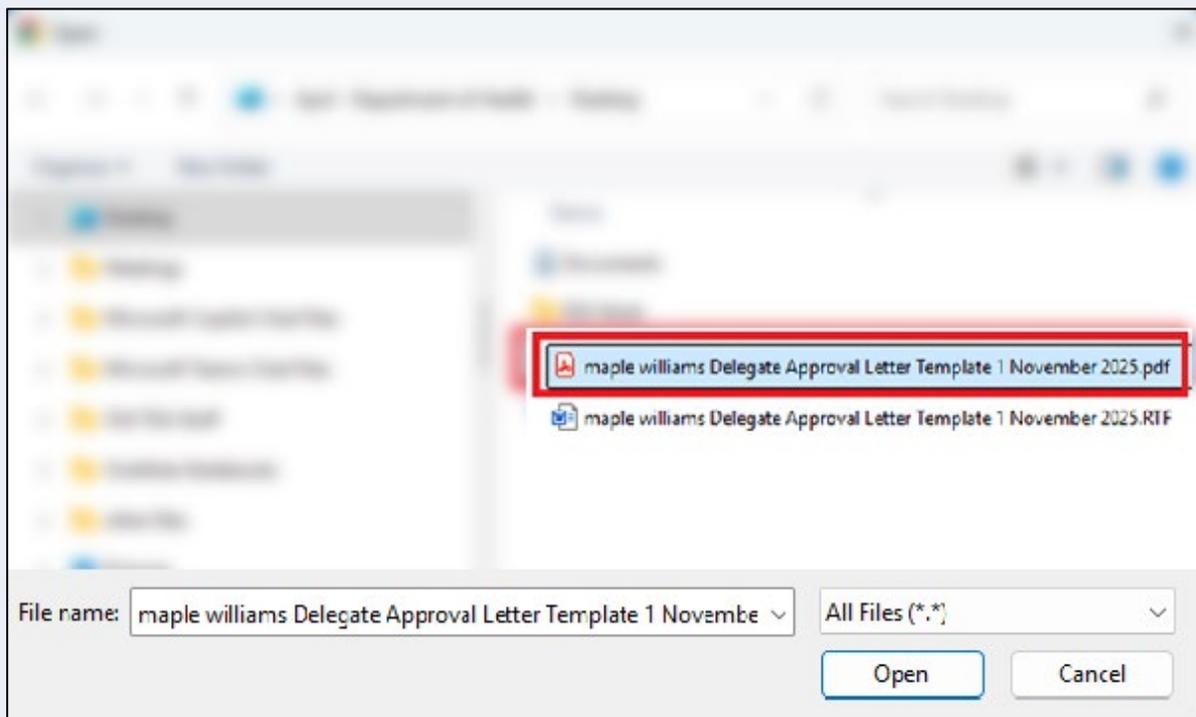
No attachments found to be displayed.

2. The Add an attachment pop up appears. Select **Choose File**.



3. Select the approval letter and then select **Open**.

! The system supports a maximum file size of 5MB.
Only the following file types are accepted: jpeg, jpg, bmp, png, docx, slsx, pdf, or txt.
The approval letter will automatically download as Rich Text Format (rtf), which means you will need to convert to one of the above accepted file types prior to uploading.



4. The attachment's name will display next to the Choose File button.

Next, enter the Name of the attachment, and select the Type of attachment as **Approval Letter Sent to Client**.

Optionally you can provide a short description about the contents of the attachment such as assessment date and time.

Then, select **Upload**.

Add an attachment

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

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

You can upload files up to 5 MB to this record. The following file types are accepted: .jpeg, .jpg, .bmp, .png, .docx, .xlsx, .pdf, .txt *

CHOOSE FILE **maple willi...r 2025.pdf**

Name of the attachment: * **Maple Williams Delegate Approval Letter 1 November 2025** Type of attachment: * **Approval Letter Sent to Client**

Please provide a short description about the contents of the attachment, e.g. assessment date and time

(250 characters)

UPLOAD CANCEL

5. The letter now appears under the **Assessment Attachments** tab of the **Attachments** page.

Home | Find a client | maple WILLIAMS

maple WILLIAMS

Female, 75 years old, 5 September 1950, AC72685944
Lot Number 5 ELDON STREET INDOOROOPILLY, QLD, 4068

Primary contact: maple williams (self)
No support relationships recorded

Attachments

REFER THIS CLIENT FOR ASSESSMENT | VIEW CLIENT REPORT | CONTINUE SUPPORT PLAN REVIEW

Client summary | Client details | Support network | Approvals | Plans | **Attachments** | Services | My Aged Care interactions | Notes

Tasks and Notifications | Residential Funding Classifications

Attachments

ADD AN ATTACHMENT

Assessment Attachments | Other Attachments | Correspondence

Approval Letter Sent to Client 4 November 2025

Maple Williams Delegate Approval Letter 1 November 2025 [pdf 311.38KB] [HIDE FROM VIEW](#)

Support Plan - External 14 July 2025

AC72685944__2-21UJRNPT-Finalised-20251407092811.pdf [65.18KB]

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