



Australian Government



myagedcare

Assessor Portal User Guide 4 - Navigating and updating the client record

This guide outlines the contents and functions of the client record at a high level. Client records grant aged care needs assessors (assessors), providers, and My Aged Care staff with a single point of reference for client information.

The client record is also a valuable tool for easily setting up emergency contacts, disseminating important information between client , and facilitating the assessment of clients.

After a client and/or their support network has provided consent to enable their personal details to be appropriately recorded in My Aged Care and shared with assessors and Aged Care service providers, you will be able to interact with the many tabs of the client record elements as described in this guide.

If the client and/or their carer request a call back from Carer Gateway and/or the National Dementia Helpline, assessors will need to obtain further consent in the relevant area in the assessor portal.



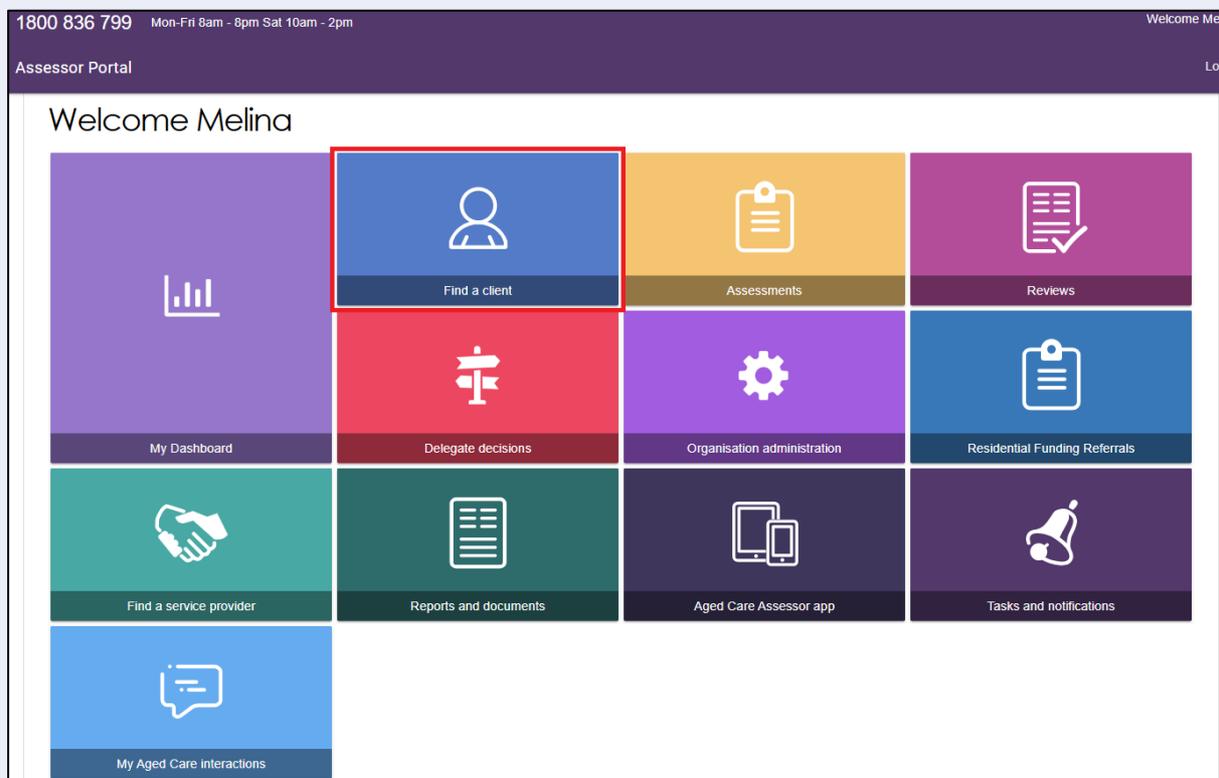
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Accessing the client record

The Find a client function enables assessment organisations to search for all clients registered with My Aged Care. Assessment Organisations can only search for clients who have been referred to, and accepted by, their organisation.

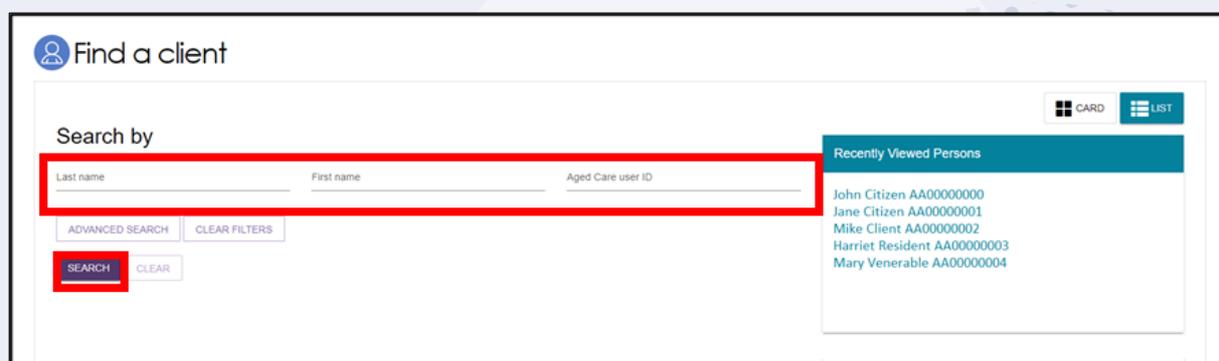
1. Log in to the My Aged Care assessor portal. From the home screen select the **Find a client** tile.



2. You can do a basic search by entering the **First Name**, **Last Name**, or **Aged Care User ID** into the fields, and then selecting the **SEARCH** button.

To go directly to a recently viewed client, use the links under **Recently Viewed Persons** heading on the right.

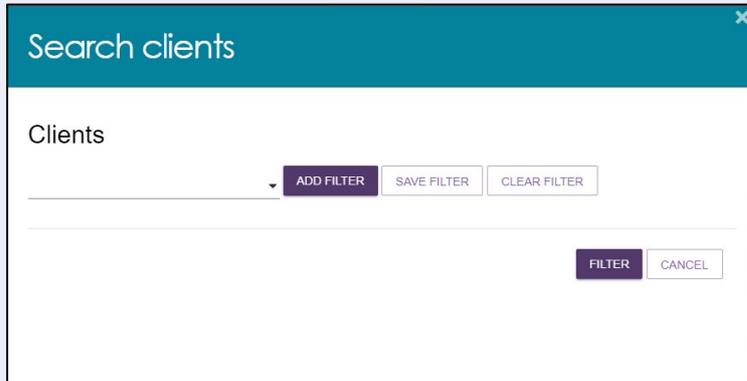
You can also switch how the results are displayed between **CARD** view and **LIST** view by selecting the appropriate button at the right.



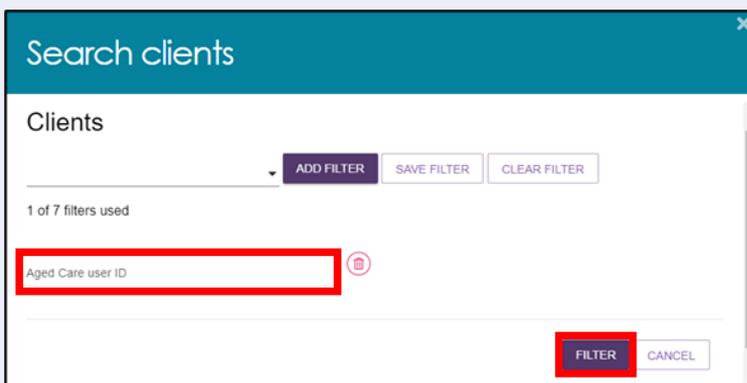
! The **Find a client** function enables assessment organisations to search for all clients registered with My Aged Care. Service providers can only search for clients who have been referred to, and accepted by, their organisation.

- Alternatively, you can do an advanced search. Advanced search works by applying filters to the list of clients. These filters include options such as **First Name**, **Home Contact Number**, **Postcode** etc. By adding multiple filters together, specific groups of clients can be found.

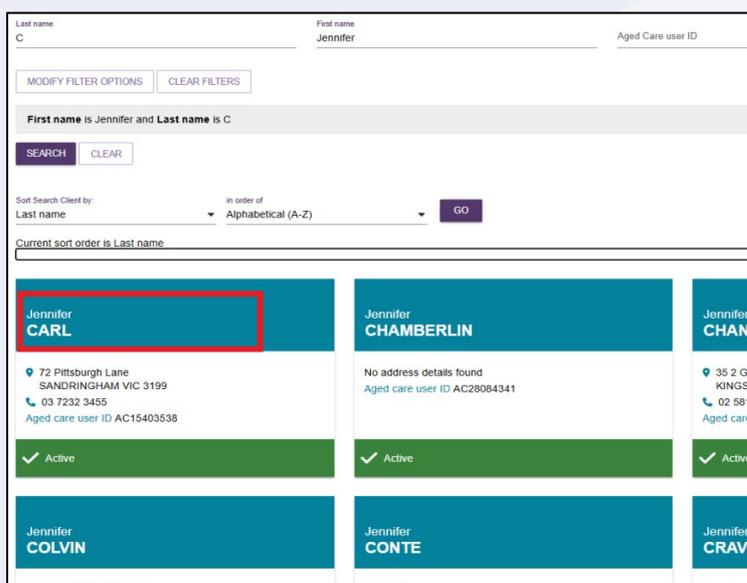
Select the **ADVANCED SEARCH** button. A pop-up window will open. Use the drop-down arrow to choose the kind of filter you wish to add. Then, select the **ADD FILTER** button to reveal the input field for that filter.



- Fill in the input field with the information required. You can repeat the process above to add additional filters to the advanced search. A maximum of 7 filters can be applied at once. Once you have finished adding filters, select the **FILTER** button to begin your advanced search.



- Select the name of your chosen client to proceed to their client record.



Accessing a Sensitive Client Record

A sensitive client record may contain one or more:

- sensitive attachment
- sensitive client status
- sensitive notes.

In the Client Record, the client details banner will have wording to this effect underneath the client's address, to identify that this record contains sensitive information.

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

Assessor Portal Logout

Home | Find a client | Carter CLIENT

Mr Carter CLIENT
Male, 87 years old, 1 July 1935, AC42652446
84 OODGEROO AVENUE FRANKI IN. ACT. 2913
Prefers to speak German **sensitive attachment**

Primary contact: Carter Client (self) - 0420 778 133
Carer: Amy Carer (Other) - 0423 958 692
[View support network](#)

To access the sensitive information, refer to [the Attachments tab](#) and [the Notes tab](#) for more details.

Accessing the client record of a client assigned to me

1. Log in to the My Aged Care assessor portal and select the **Assessments** tile.

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

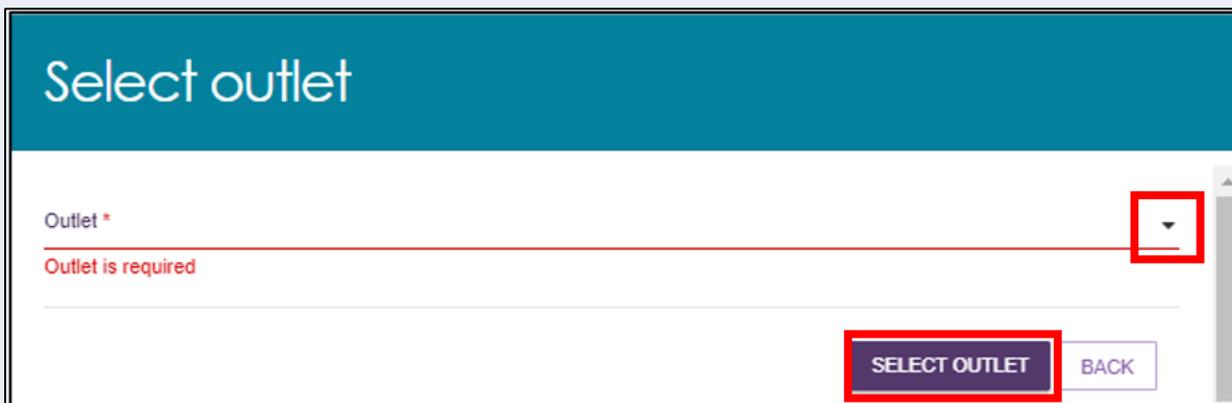
Assessor Portal Log

Welcome Melina

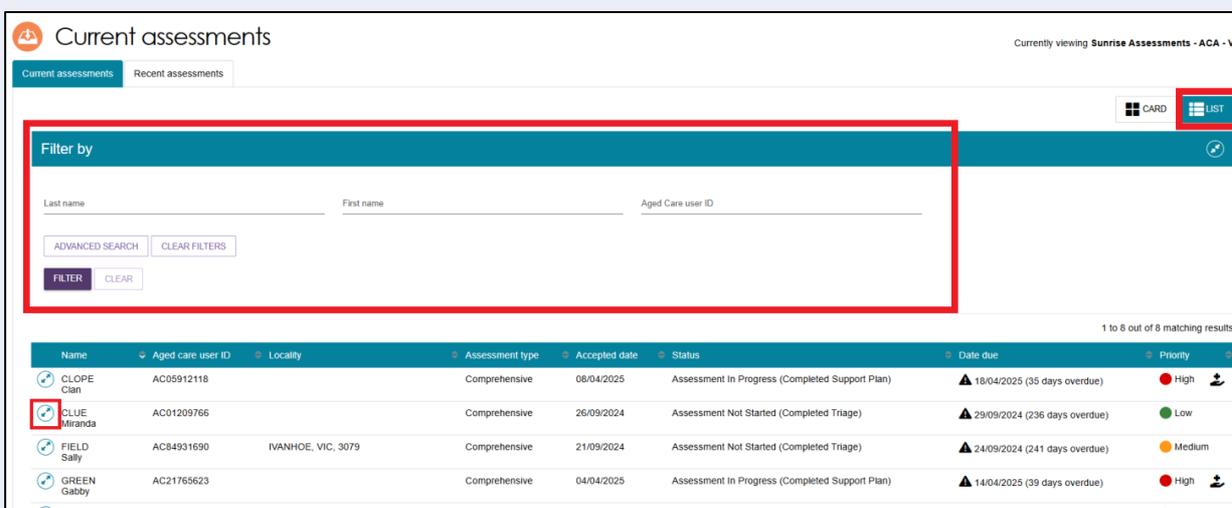
My Dashboard	Find a client	Assessments	Reviews
Find a service provider	Delegate decisions	Organisation administration	Residential Funding Referrals
Reports and documents	Aged Care Assessor app	Tasks and notifications	
My Aged Care interactions			

2. If you have access to multiple outlets, you will be prompted to select the assessment outlet where the client you are working on is linked to. Use the drop-down list to choose an assessment outlet, then select **SELECT OUTLET** to proceed.

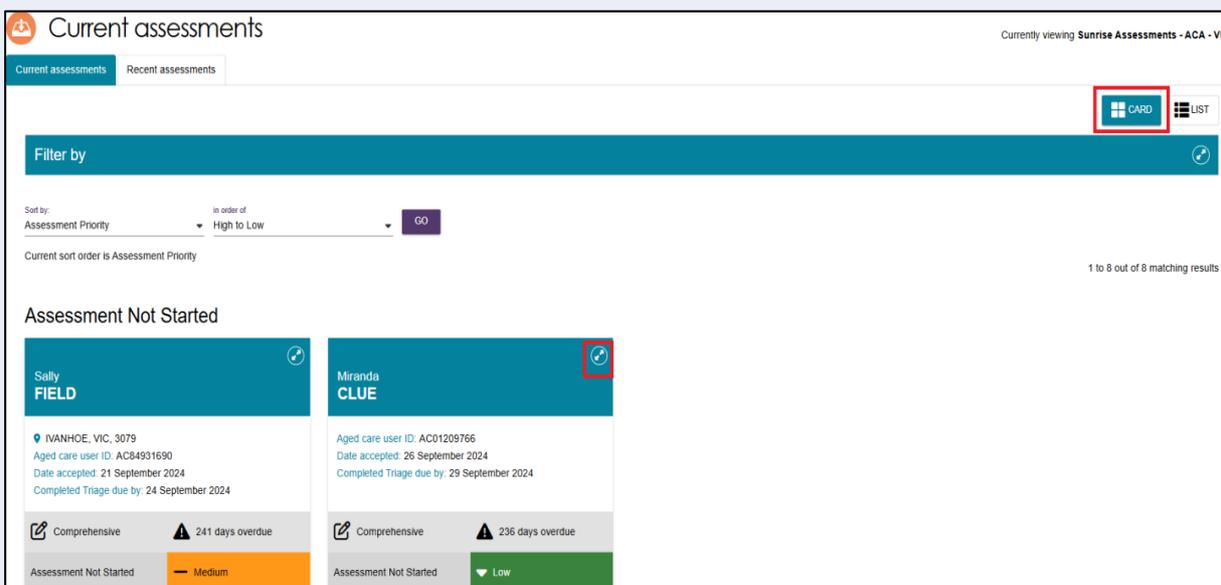




- Using the filter headings to sort your assigned clients by **Last Name, Aged Care ID, Locality** etc. Once you have found the appropriate client, use the expand button on the left to view more details.



- The **CARD** view will look as shown below. Select the expand button to view the client information.



- A pop-up will then display with expanded details for that client.

Miranda CLUE



Please confirm that Miranda CLUE, 15 February 1933, 92 Years, AC01209766 is the person you are conducting this assessment for. If the person details are incorrect, a privacy breach may occur.

Aged 92 (15 February 1933), Female

Referred from UAT Heidelberg ACAS on 26 September 2024

Accepted on 26 September 2024

Preferences

No preference was recorded

Completed Triage due by 29 September 2024

Assessment details

Assessment type Comprehensive

Assessment reason Self-Referral

Assessment setting Non-Hospital

Assessor Melina Pimentel

Triage conducted by Kendall Lyle



Client story

No client story was recorded

Comments

Cohabitant details

[Yuri GASPAR](#)

Support plan ● Triage Completed



Comprehensive Assessment ● Triage Completed



6. From this pop-up you can view the statuses of client's support plan and assessment. Further information can be viewed by selecting the magnifying glass next to status as shown in the below example.

Miranda CLUE

Aged 92 (15 February 1933), Female

Referred from UAT Heidelberg ACAS on 26 September 2024

Accepted on 26 September 2024

Preferences

No preference was recorded

Completed Triage due by 29 September 2024

Assessment details

Assessment type Comprehensive

Assessment reason Self-Referral

Assessment setting Non-Hospital

Assessor Melina Pimentel

Triage conducted by Kendall Lyle



Client story

No client story was recorded

Comments

Cohabitant details

[Yuri GASPAR](#)

Support plan ● Triage Completed



Comprehensive Assessment ● Triage Completed



[VIEW FULL CLIENT RECORD](#)

[VIEW CLIENT REPORT](#)

[REFER URGENT SERVICES](#)

[START ASSESSMENT](#)

[FLAG AS END-OF-LIFE](#)

7. You can view **Cohabitant details** if applicable. A cohabitant refers to another aged care client who lives at the same address as the client undergoing assessment and has a recorded active relationship with the client. Up to two cohabitants will be listed under this heading.



Miranda CLUE

Miranda CLUE (19 February 1955 / Female)

Received from Dr W. Hensberg, 18/26/24 on 26 September 2024

Accepted on 26 September 2024

Preferences

No preference was recorded

Completed Triage due by 29 September 2024

Assessment details

Assessment type Comprehensive

Assessment reason Self-Referral

Assessment setting Non-Hospital

Assessor Melina Pimentel

Triage conducted by Kendall Lyle

Client story

No client story was recorded

Comments

Cohabitant details

[Yuri GASPAR](#)

Support plan ● Triage Completed

Comprehensive Assessment ● Triage Completed

[VIEW FULL CLIENT RECORD](#)

[VIEW CLIENT REPORT](#)

[REFER URGENT SERVICES](#)

[START ASSESSMENT](#)

[FLAG AS END-OF-LIFE](#)

8. Select the **VIEW FULL CLIENT RECORD** button to navigate to the client record page.

Miranda CLUE

Miranda CLUE (19 February 1955 / Female)

Received from Dr W. Hensberg, 18/26/24 on 26 September 2024

Accepted on 26 September 2024

Preferences

No preference was recorded

Completed Triage due by 29 September 2024

Assessment details

Assessment type Comprehensive

Assessment reason Self-Referral

Assessment setting Non-Hospital

Assessor Melina Pimentel

Triage conducted by Kendall Lyle

Client story

No client story was recorded

Comments

Cohabitant details

[Yuri GASPAR](#)

Support plan ● Triage Completed

Comprehensive Assessment ● Triage Completed

[VIEW FULL CLIENT RECORD](#)

[VIEW CLIENT REPORT](#)

[REFER URGENT SERVICES](#)

[START ASSESSMENT](#)

[FLAG AS END-OF-LIFE](#)

9. Additionally, a summary PDF report of the client record containing client details, support network details, notes, assessment history, care approvals, and the client's interactions with My Aged Care, can be generated without needing to navigate to the client record page. Select the **VIEW CLIENT REPORT** button to generate this summary report.



Miranda CLUE

Ageed CLUE (10 February 2025), Female

Referred from SAH (Hollymolly) on 26 September 2024

Accepted on 26 September 2024

Preferences

No preference was recorded

Completed Triage due by 29 September 2024

Assessment details

Assessment type Comprehensive

Assessment reason Self-Referral

Assessment setting Non-Hospital

Assessor Melina Pimentel

Triage conducted by Kendall Lyle

Client story

No client story was recorded

Comments

Cohabitant details

[Yuri GASPAR](#)

Support plan ● Triage Completed

Comprehensive Assessment ● Triage Completed

[VIEW FULL CLIENT RECORD](#)

[VIEW CLIENT REPORT](#)

[REFER URGENT SERVICES](#)

[START ASSESSMENT](#)

[FLAG AS END-OF-LIFE](#)

The Client Summary tab

1. Select the **VIEW FULL CLIENT RECORD** button to navigate to **Client summary** screen. The **Client summary** tab provides an overview of the client's completed and in-progress assessments. The Client summary tab serves as the primary location for assessors to quickly access client information and coordinate care effectively.

Mia STRONG
Female, 75 years old, 1 July 1950, AC75363721
86 HOLLYMOLLY APPROACH LASSARRAP, WA, 6200
Prefers to speak Vietnamese

Primary contact: Mia Strong (self) - 0402 246 860
No support relationships recorded

Client summary

[REFER THIS CLIENT FOR](#)

- Client summary** (highlighted)
- Client details
- Support network
- Approvals
- Plans
- Attachments
- Services
- My Aged Care interactions
- Notes
- Tasks and Notifications
- Residential Funding Classifications

Client summary

Assessments

Comprehensive Assessment

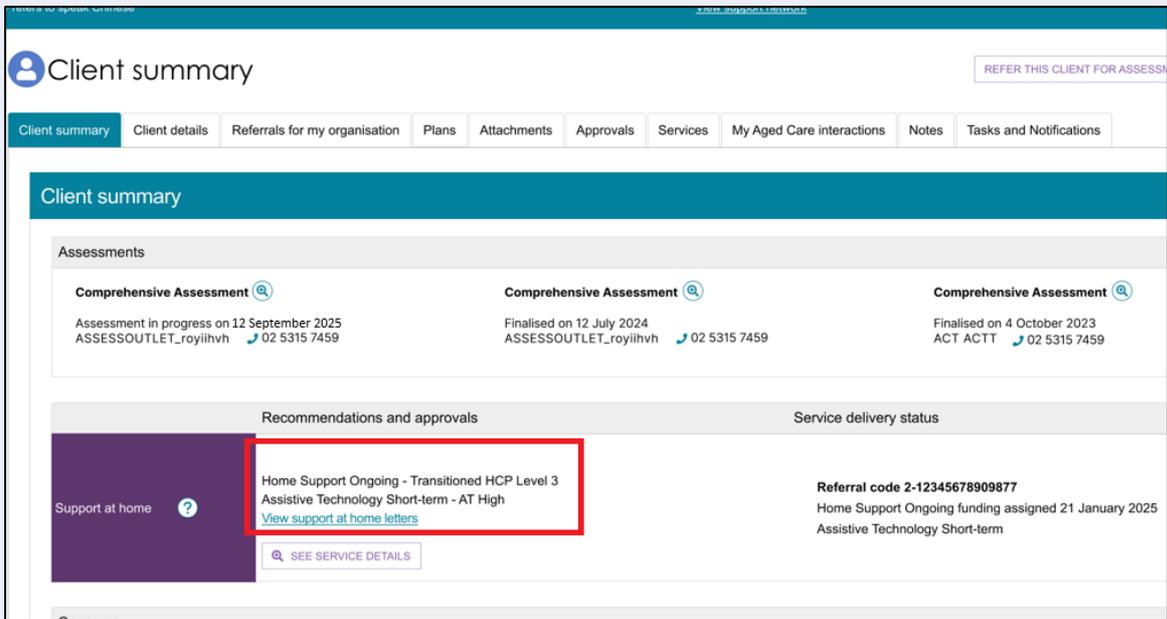
Delegate Decision Complete on 29 August 2025
GRAZIER AGED CARE - ACA - ACT 07 7457 4574

Recommendations and approvals	Service delivery status
Home support Ongoing - SaH Classification 8	Home support Ongoing - SaH Classification 8 Funding pending
Assistive technology Short-term - AT Medium	Assistive technology Short-term - AT Medium Funding pending
Home modifications Short-term - HM Medium	Home modifications Short-term - HM Medium Funding pending

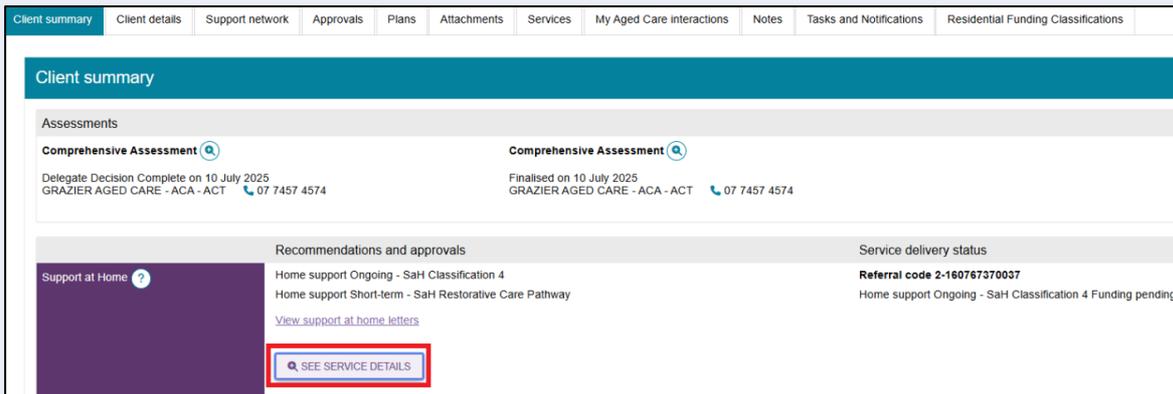
[SEE SERVICE DETAILS](#)

The below image shows an example of client transitioned from a Home Care Package (HCP) classification.

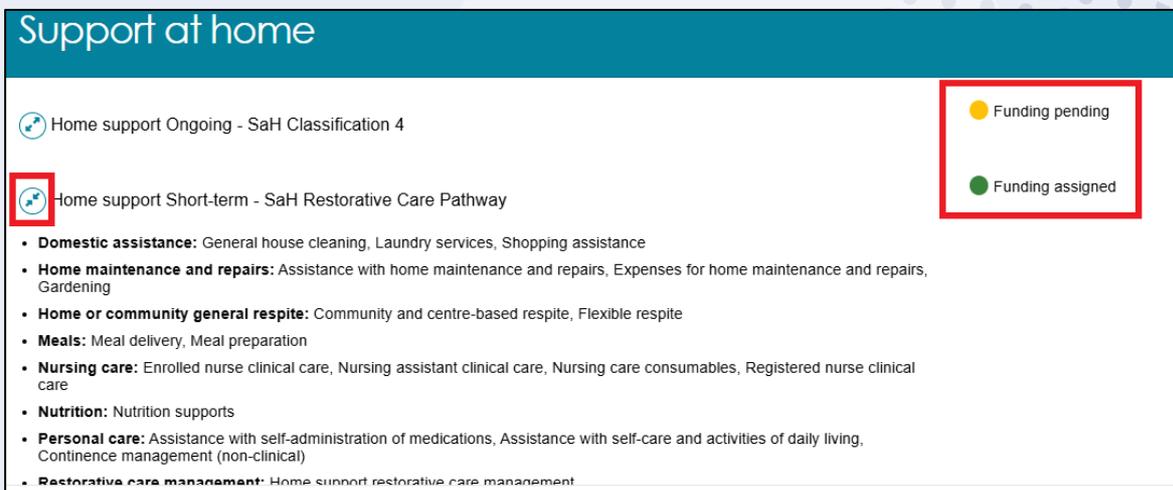




2. The **See Service Details** Button in the Client Summary screen provides assessors with a detailed view of the services linked to a client. It displays information such as service provider details, referral history, funding status, service delivery status, and any short-term support arrangements like reablement. This feature helps assessors monitor service progress and ensure alignment with the client's support plan.



3. A pop-up window will open which displays all the recommended services. Select the Expander icon to view more details. The user will also be able to know the funding status of the recommended service.



The below image shows an example of same page for a client with **Transitioned Home Care Package (HCP) classification**.

Support at home

Home Support Ongoing - Transitioned HCP Level 4 ● Funding assigned

- **Domestic assistance:** General house cleaning, Laundry services, Shopping assistance
- **Home maintenance and repairs:** Gardening, Assistance with home maintenance and repairs, Expenses for home maintenance and repairs
- **Meals:** Meal delivery, Meal preparation
- **Social Support and Community Engagement:** Group social support, Individual social support, Accompanied activities, Cultural support, Digital education and support, Assistance to maintain personal affairs, Expenses to maintain personal affairs
- **Transport:** Direct transport, Indirect transport
- **Personal care:** Assistance with self-care and activities of daily living, Assistance with the self-administration of medication, Continence management (non-clinical)
- **Care management:** Home support care management
- **Nursing care:** Registered nurse clinical care, Enrolled nurse clinical care, Nursing assistance clinical care, Nursing care consumables
- **Allied health and therapy:** Allied health assistance, Podiatry, Social work, Speech pathology, Diet or nutrition, Aboriginal or Torres Straight Islander Health Practitioner assistance, Aboriginal or Torres Straight Island Health worker assistance, Physiotherapy, Psychology, Exercise physiology, Occupational therapy, Counselling or psychotherapy, Music therapy

Place assigned FSO - Interim - HCP Level 2

CLOSE

4. The Client summary information can be printed by using the **Print Page** button on the right-hand side of each heading.

Client summary

REFER THIS CLIENT FOR ASSESSMENT VIEW CLIENT REPORT

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

Client summary 🖨️

Assessments

The Client Details tab

The **Client details** tab displays a detailed profile of the client. It includes essential personal and demographic information used to support assessment and care planning. This tab ensures assessors have a comprehensive and up-to-date profile to inform decision-making and support accurate, person-centered care planning. Assessors can update any information by selecting the **Edit** (pencil) icon. The page also contains an option to notify My Aged Care when the client is deceased. Refer to [Notifying My Aged Care that the client is deceased](#) for more information.

Client details

REFER THIS CLIENT FOR ASSESSMENT VIEW CLIENT REPORT

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

About Gemma NOTIFY MY AGED CARE OF A DEATH

Personal information 🔍

Born 24 February 1945, Iranian, born in Iran, divorced, lives alone
Status: Active

To contact Gemma 🔍

Contact details:

- Preferred correspondence method is Post
- 02 8888 7832 (home)
- 02 9505 7032 (mobile) - Preferred contact number ● Verified
- Heleen.Montague@rest.apogee.usb (email)

Primary Contact 🔍

This is who My Aged Care will contact first
Gemma ALANIS (self)

Notification preferences 🔍

Current preferences:

- Gemma Alanis, Self EMAIL SMS

Communication requirements 🔍

- Prefer to speak English
- Does not need help to communicate

Address details 🔍

Home address
Unit 308, 77 3 RIDGE STREET GORDON, NSW, 2072

Identity documents (ID) 🔍

Aged Care ID: AC63228050
Medicare Card Number: 41478948181
Centricis Customer Reference Number (CRN): 0264527294
Aged Care Management Payment System (ACMPS) number: 0414095782
System for the Payment of Aged Residential Care (SPARC) number: 1960463

Identity Status

IHI Record status: Unsuccessful - Error
Identity match status: Not Matched
Wallet check status: Not Required
Client association status: Associated

Payment details 🔍

Receiving payments:

- Aged Pension - Full Payment

Health insurance

Private health insurance
No health insurance found

Service information

The following information is from the Department of Human Services claims system. It may take up to a month to be updated

Consent 🔍

Consent to share information with My Health Record: Permit by Gemma Alanis (Self)



! The **Primary Contact** can be nominated by the client or a person in their support network. This information allows assessors, My Aged Care contact centre staff and service providers to identify the key contact details for a client. This field does not impact on any system generated mail correspondence that the client may receive in relation to their care.

The **Find a client** function enables assessment organisations to search for all clients registered with My Aged Care. Service providers can only search for clients who have been referred to, and accepted by, their organisation.

When adding or editing address details, it is important to validate the address by selecting the **VALIDATE THIS ADDRESS** button prior to saving. This ensures that the client and their support network can receive communication from the My Aged Care system.

The screenshot shows a web form titled "Edit client's Home address details". At the top, it states "All fields marked with an asterisk (*) are required." The form contains several input fields: "Unit number or building name and level (if applicable)", "Street number e.g. 201 or 34-36 *", "Street name *", "Street type *", and "Enter Suburb and postcode and select from the list below *". Below the suburb field is a button that says "SUBURB IS NOT LISTED, CLICK HERE". The "Country *" field is set to "Australia". A button labeled "VALIDATE THIS ADDRESS" is highlighted with a red rectangular box. At the bottom of the form are two buttons: "SAVE ADDRESS" and "CANCEL".

My Aged Care clients and their support network can also receive email and/or SMS notifications when a client reaches the following key stages of their My Aged Care journey:

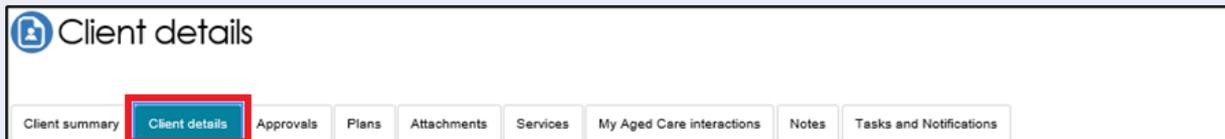
- client registration is complete
- the client's assessment is finalised
- the client is approved for care after a Comprehensive assessment
- a client is assigned a Support at Home service and at any stage that a letter is generated for a client such as an assignment letter or withdrawal letter
- a Support Plan Review request has been submitted
- a support relationship is activated, declined, inactivated or expiring, and the submission or actioning of documents relating to support relationships.

For more information about setting up and configuring notifications for clients and/or their support network, refer to [My Aged Care – Assessor Portal User Guide 2 – Registering support people and adding relationships](#).

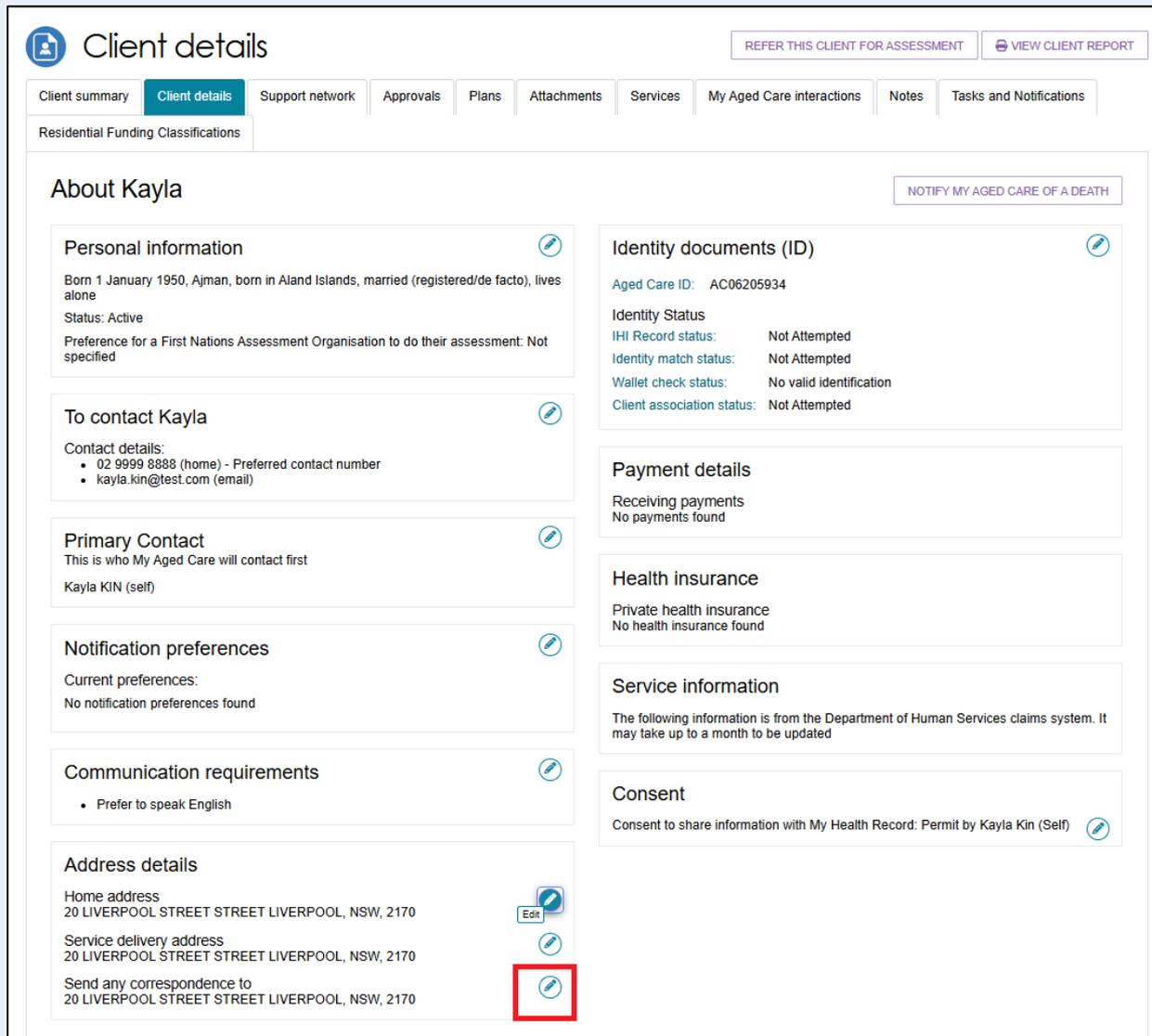
Adding a Post Office Box address

Only Clinical assessors and assessment delegates can add a Post Office Box address to a client record as the preferred address for all correspondence.

This is completed on the **Client details** tab in the client record.



1. In the Address details section, select the edit icon next to **Send any correspondence to**.

A screenshot of the 'Client details' page for a client named Kayla. The page has a navigation bar with tabs: Client summary, Client details (selected), Support network, Approvals, Plans, Attachments, Services, My Aged Care interactions, Notes, and Tasks and Notifications. Below the navigation bar is a sub-tab for 'Residential Funding Classifications'. The main content area is titled 'About Kayla' and contains several sections: Personal information, To contact Kayla, Primary Contact, Notification preferences, Communication requirements, and Address details. The Address details section is highlighted with a red box and contains three entries: Home address, Service delivery address, and Send any correspondence to. The 'Send any correspondence to' entry has an edit icon next to it, which is also highlighted with a red box. Other sections include Identity documents (ID), Payment details, Health insurance, Service information, and Consent.

2. Select Postal address.

Edit client's Correspondence address details

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

What type of address? Street address Postal address e.g. Post Office Box

Postal address type *

Postal address number *

Enter Suburb and postcode and select from the list below *

FRANKLIN, ACT, 2913

SUBURB IS NOT LISTED, CLICK HERE

Country *

Australia

VALIDATE THIS ADDRESS

Special instructions (up to 100 characters)

SAVE ADDRESS CANCEL

Recording consent to share information with My Health Record

1. Within the client details tab, you can also view and update the client's consent status to share information with My Health Record via the **Consent** section. To update a client's consent, select the **EDIT** (pencil) icon.

Client details

REFER THIS CLIENT FOR ASSESSMENT VIEW CLIENT REPORT

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

Residential Funding Classifications

About Kayla

NOTIFY MY AGED CARE OF A DEATH

Personal information

Born 1 January 1950, Ajman, born in Aland Islands, married (registered/de facto), lives alone
Status: Active
Preference for a First Nations Assessment Organisation to do their assessment: Not specified

To contact Kayla

Contact details:
• 02 9999 8888 (home) - Preferred contact number
• kayla.kin@test.com (email)

Primary Contact

This is who My Aged Care will contact first
Kayla KIN (self)

Notification preferences

Current preferences:
No notification preferences found

Communication requirements

• Prefer to speak English

Address details

Identity documents (ID)

Aged Care ID: AC06205934
Identity Status
IHI Record status: Not Attempted
Identity match status: Not Attempted
Wallet check status: No valid identification
Client association status: Not Attempted

Payment details

Receiving payments
No payments found

Health insurance

Private health insurance
No health insurance found

Service information

The following information is from the Department of Human Services claims system. It may take up to a month to be updated

Consent

Consent to share information with My Health Record: Permit by Kayla Kin (Self)



2. A pop-up will display. If the client consent's to sharing their information with My Health Record, select **Yes**, answer if the consent was provided by either the client or their supporter-guardian, and select **SAVE**.

Consent to share information with My Health Record

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

Information

The client can choose to share the support plan from this assessment via their My Health Record if they have an active account. This will allow the support plan to be viewed by whoever has access to view their medical records. This may include healthcare providers, the client's nominated representative(s), and the client themselves. If the client does want this information made available via My Health Record, they must provide informed consent. This is necessary to meet requirements of both the Privacy Act 1988 with respect to the collection, use and disclosure of personal and sensitive information and the use and disclosure of protected information under Chapter 7, Part 2 of the Aged Care Act 2024. If there is a suggestion that the client lacks capacity, this decision can be made in consultation with the client's confirmed representative in My Aged Care.

Does the client consent to share their Support Plan with My Health Record (MHR)? *

No Yes

Consent decision by *

Comments:

SAVE CANCEL

If the answer is **No** and the client or their supporter-guardian is withdrawing their consent, then any previously shared support plan details will be removed from the client's My Health Record. Select a consent denial reason from the drop-down list and then select **SAVE**.

Consent to share information with My Health Record

X Please select a valid response from Consent denial reason

Does the client consent to share their Support Plan with My Health Record (MHR)? *

No Yes

i By revoking this consent, My Aged Care will notify My Health Record to remove any previously shared support plan details

Consent decision by *

Client

Consent denial reason *

Please select a reason for not providing the consent

Please select a reason for not providing the consent

Do not wish to disclose

Other

Privacy concerns

SAVE CANCEL





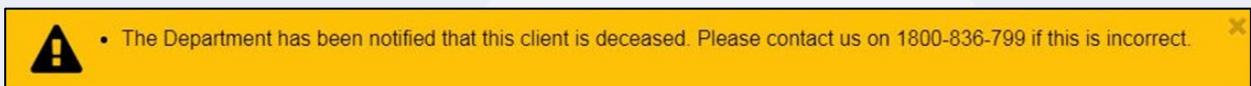
If the consent decision has been made by a supporter-guardian then you will be required to enter the supporter's **FIRST NAME** before proceeding.

If the consent denial reason is **OTHER**, a comment about the denial **MUST** be entered before selecting **SAVE**.

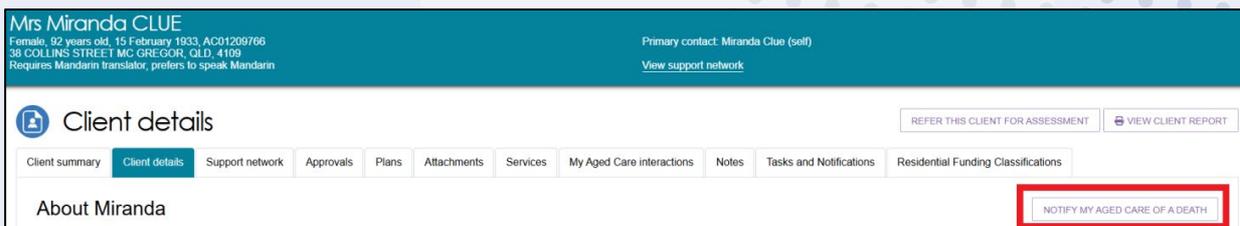
Notifying My Aged Care that the client is deceased

If a client's status is **Deceased**, the clients record will be read-only, and you will not be able to edit any client information. Once this status is updated in My Aged Care, the clients support network will no longer have access to the clients' record. A notification will be sent to the client's assessor and provider advising them to close or finalise any in-progress tasks. Additional notes and attachments can be attached to the client record and assessments can be finalised after the status is changed.

A banner will be displayed on all tabs of the client record. If the client's status is incorrect, please contact the service provider and assessor helpline on 1800 836 799.



1. Select the **NOTIFY MY AGED CARE OF A DEATH** button in the **Client Details** page of the client record.



2. A pop-up screen will prompt you to input all information and upload the supporting documents as required. Select **SAVE**.



Notify My Aged Care that a person is deceased

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

You are about to notify the department that Miranda Clue has passed away. Their record will become read only. You will still be able to finalise outstanding assessments and support plan reviews, and add notes and attachments.

Please supply the following information:

Who, when and how were you informed that this person is deceased? * ?

0 / 500

Date of death
(if known)

dd/mm/yyyy

Add Attachments

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
(if available)

Choose a file...

SAVE

CANCEL

3. A dialogue box will be displayed. To confirm, select **OK**.

Confirm notification to My Aged Care

You are about to notify My Aged Care that this person is deceased. This will automatically close all active records such as assessment referrals, services, service referrals etc.

These changes cannot be reverted.

Click OK to confirm to My Aged Care that Miranda Clue is deceased and the information provided is correct. Click Cancel to update or provide additional information.

OK

CANCEL

4. You will be directed to the **CLIENT DETAILS** page where the following banners will be displayed.

✓ Thank you for notifying My Aged Care. We will update our records shortly.

⚠ The Department has been notified that this client is deceased. Please contact us on 1800 836 799 if this is incorrect.

5. The client status will be updated to deceased on the records. The client card will appear as shown below. If there are any in-progress assessments for the client, a notification will be sent to the associated assessor and provider advising them to close or finalise the in-progress tasks.

Miranda
CLUE

38 Colins St
MC GREGOR QLD 4266
Aged care user ID AC00463760

Deceased



The Support Network tab

The **Support Network** tab provides a summary of the people and relationships that play a role in supporting the client. This includes informal support such as family members, friends, or neighbours, as well as formal supporters like carers, supporter guardians or supporter organisations. The tab outlines each person's relationship with the client, their role in the client's care, and their contact details if relevant. This information helps assessors understand the client's current support structure and identify any gaps in care or additional support needs.

For more information about creating a supporter relationships, refer to [My Aged Care – Assessor Portal User Guide 2 – Registering support people and adding relationships | Australian Government Department of Health and Aged Care](#).

The screenshot shows the 'Support network' tab for a client named Mrs Jennifer CARL. The interface includes a navigation menu with tabs for Client summary, Client details, Support network (highlighted), Approvals, Plans, Attachments, Services, My Aged Care interactions, Notes, Tasks and Notifications, and Residential Funding Classifications. Below the navigation, there are buttons for 'CREATE RELATIONSHIP' and 'NOTIFY MY AGED CARE OF A DEATH'. The main content area is titled 'Supporters' and displays three supporter cards: Vincent NAUGHTON (Friend), Roland MOSES (Other), and Ariana POWERS (Friend). Each card shows the supporter's name, relationship type, and contact details, along with a date when they became a supporter.

The Approvals tab

The Approvals tab displays the outcomes of a client's assessments, and the types of government funded services they have been approved to receive. The information on this page helps assessors, clients, and service providers understand what care options the client is eligible for and guides service referrals and care planning accordingly. Additional approval details, such as status and priority category can be viewed by selecting the expand buttons next to each approval. These include setting up who to notify to receive correspondence.

1. Select the **Approvals** tab to navigate to the approvals page of the client record.

The screenshot shows the 'Approvals' tab for the same client. The navigation menu is similar, but the 'Approvals' tab is highlighted. The main content area is titled 'Current care approvals' and displays three approval cards: Home support Ongoing - SaH Classification 8, Assistive technology Short-term - AT Medium, and Home modifications Short-term - HM Medium. To the right, there is a section titled 'Seeking services' which lists the client's preferences for seeking services through the Support at Home program, including Home support Ongoing, Home modifications, and Assistive technology. Each entry shows the client's current status (Seeking services) and the last update date and time by the assessor.

The below image shows an example of a client who was previously approved for a Home Care Package. They will have a new status of 'Transitioned HCP Level [number]'



View support network

Current care approvals

- Residential Permanent
- Home support Ongoing - Transitioned HCP Level 3

Previous care approvals

2. Select the expand icon  next to the relevant care approval to view more details.

no support

Current care approvals

- Home support Ongoing - SaH Classification 8
- Assistive technology Short-term - AT Medium
 - Delegated decision completed and submitted to SvA.
 - Priority category: Medium
 - Approval starts: 29 August 2025
 - Approval stops: 21 November 2026
 - Status: Funding pending
 - Source System: Gateway
 - Assistive technology services: **Equipment and Products:** Assistive technology prescription and clinical support, Communication and information management products, Domestic life products, Mobility products, Self-care products, Managing body functions
 - Seeking services
- Home modifications Short-term - HM Medium
 - Delegated decision completed and submitted to SvA.
 - Priority category: Medium
 - Approval starts: 29 August 2025
 - Approval stops: 21 November 2026
 - Status: Funding pending
 - Source System: Gateway
 - Home modifications services: **Home Adjustments:** Home modifications prescription and clinical support, Home modification products
 - Seeking services

3. If the clients' circumstances change, and they want to amend the services from Seeking to Not Seeking, this can be performed through the **CHANGE** button. Please note this process is required for all Support at Home service types that the client is approved for. If the client's place has previously been "withdrawn" please advise them to call My Aged Care to be opted back into the Support at Home Priority System.

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

This page shows you what care approvals are in place

Current care approvals

- Residential Permanent
- Home support Ongoing - SaH Classification 6
- Home modifications Short-term - HM Medium
- Assistive technology Short-term - AT Medium

Seeking services

All dates and times are in Australian Eastern Time (AEST)
The client's preference/s for seeking services through the Support at Home program are:

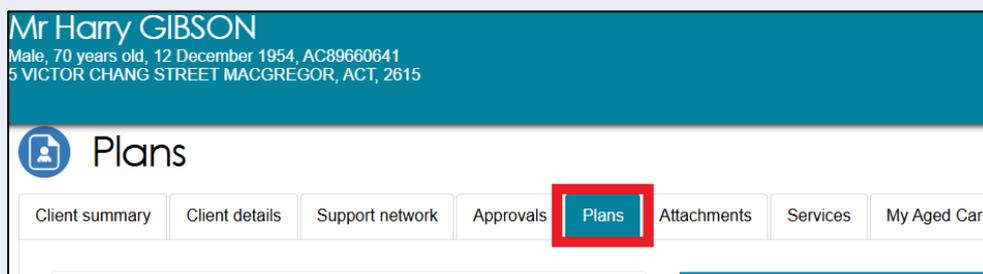
- Home support Ongoing - client is **Seeking services**
Last update: 29/08/2025 4:06:21 PM by Africa Green (Assessor)
- Home modifications - client is **Not seeking services**
Last update: 29/08/2025 3:52:42 PM by Africa Green (Assessor) with reason: Did Not Wish to Specify
- Assistive technology - client is **Not seeking services**
Last update: 29/08/2025 3:53:38 PM by Africa Green (Assessor) with reason: Means Testing/Contributions



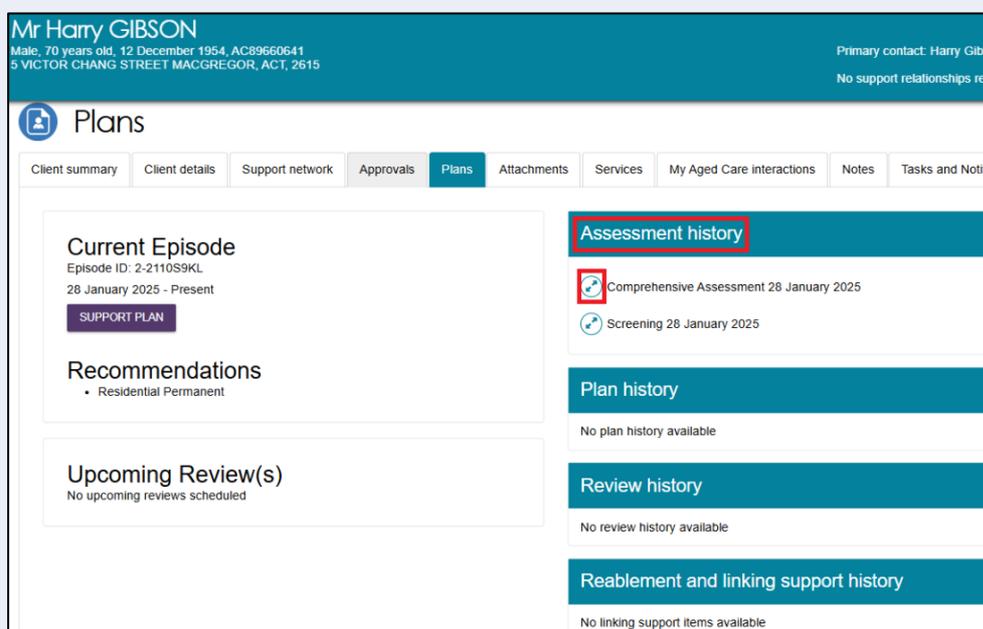
The Plans tab

The Plans tab provides a summary of the client's support plan, outlining the outcomes of their assessment and the services or goals identified to meet their needs.

1. Select the **Plans** tab to navigate to the plans page of the client record.



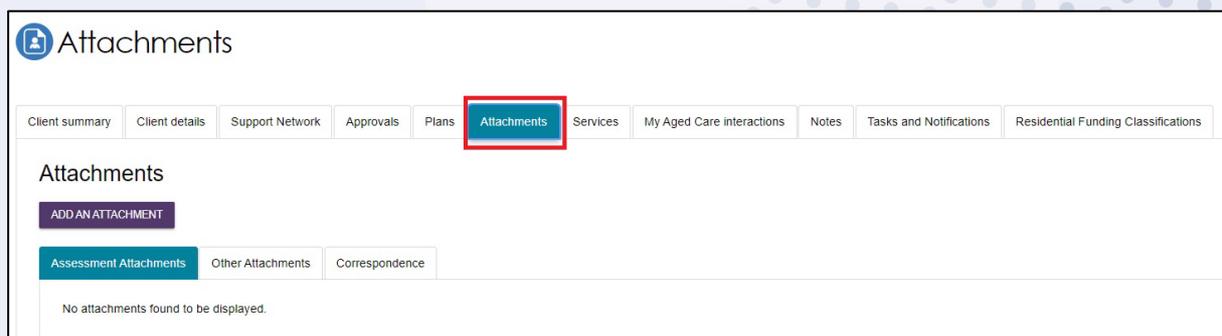
2. Additional assessment details can be viewed by selecting the expand buttons next to each item under the **Assessment history** header.



The Attachments tab

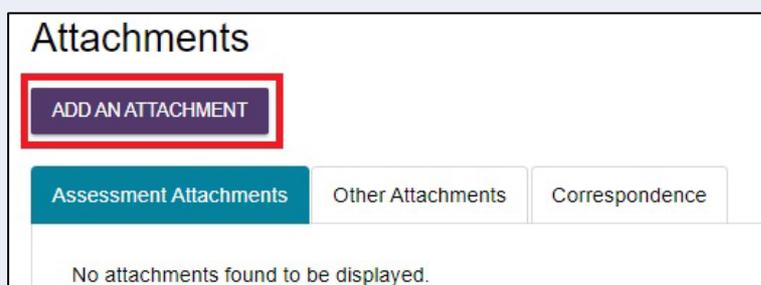
The **Attachments** tab allows assessors to upload, view, and manage documents related to a client's assessment and care planning. The attachments tab contains documents that have been attached to the client record, including attachments that have been uploaded using the Aged Care Assessor App. This is also where assessors can add an attachment to the client record.

1. Select the **Attachments** tab to navigate to the attachments page of the client record.

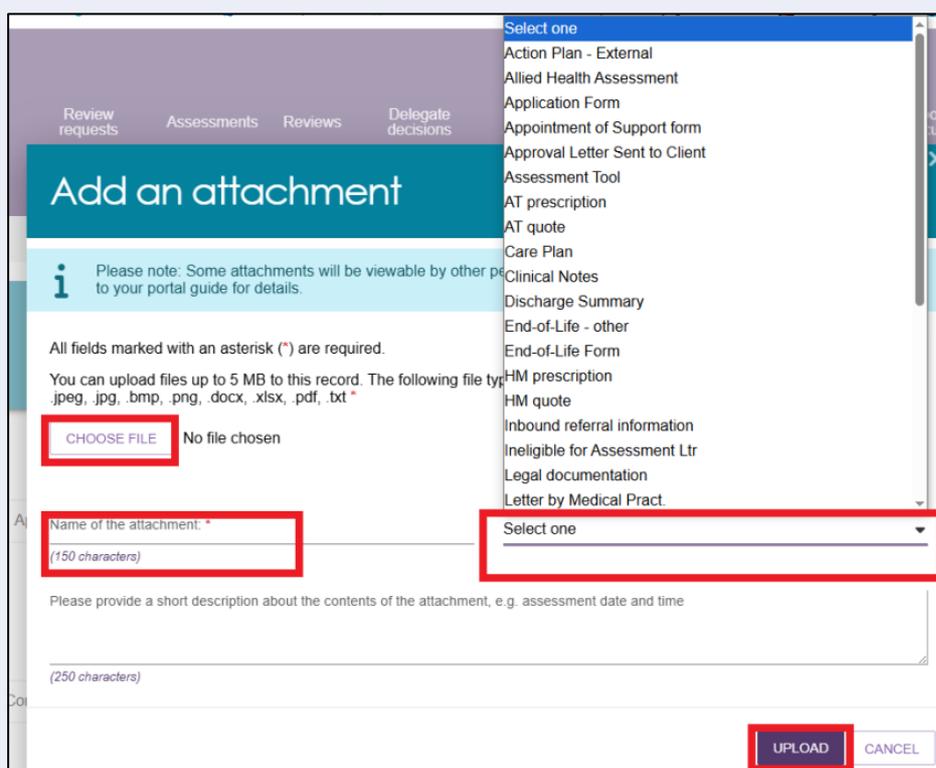


- **Assessment Attachments** are any documents that are relevant to the client's assessment, for example, clinical notes or a discharge summary. This includes Notice of Decision (approval or non-approval) letters that assessors can generate and upload.
- **Other Attachments** are documents that relate to the clients' general circumstances, for instance, documents related to the establishment of a support relationship (including legal documentation), and Occupational Therapist drawings used in home modifications.
- **Correspondence** are documents/letters that are generated in My Aged Care, related to Support at Home services. There are several letters sent to clients related to their Support at Home service at different stages. Copies of these letters will also be sent to their support person(s).
- **Sensitive Attachments** are documents that contain client information of a sensitive nature. For example, documents about a client's financial situation, safety concerns and legal issues that may impact the provision of services.

2. To add an attachment, select the **ADD ATTACHMENT** button.



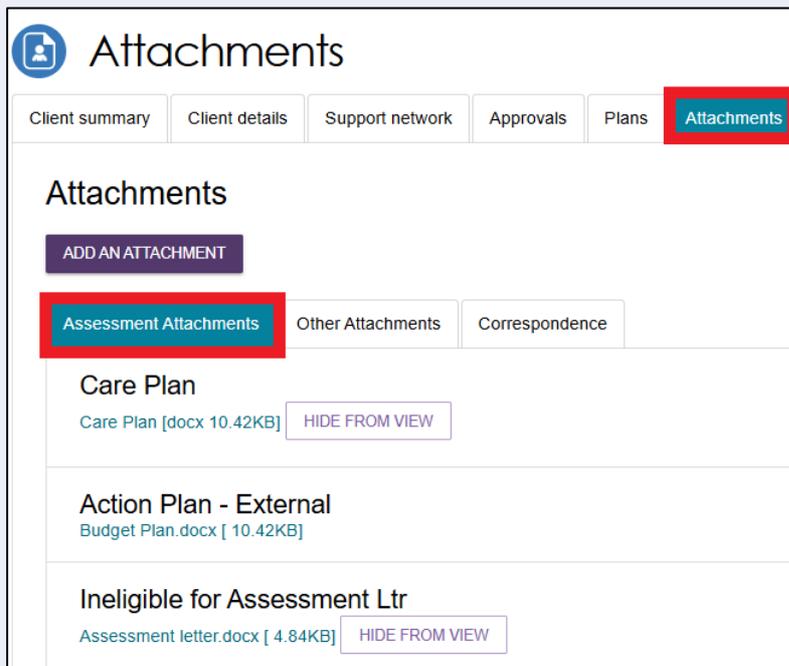
3. A pop-up window will appear, prompting you to find and upload the desired attachment. Search your computer for the document you wish to attach by selecting the **Choose file** button. Provide additional details by inputting the **Name of the attachment**, choosing the **Type of attachment** from the drop-down lists, and providing a **short description**. Finally, select the **UPLOAD** button to save your attachment to the client record.



! Where a client record has a Sensitive Attachment and the client is referred for service provision, service provider(s) will be notified that a Sensitive Attachment exists for the client. Service providers cannot view sensitive attachments; they will be directed to contact the assessor who conducted the last assessment, or the My Aged Care Service Provider and Assessor Helpline on 1800 836 799 to access information within the Sensitive Attachment.

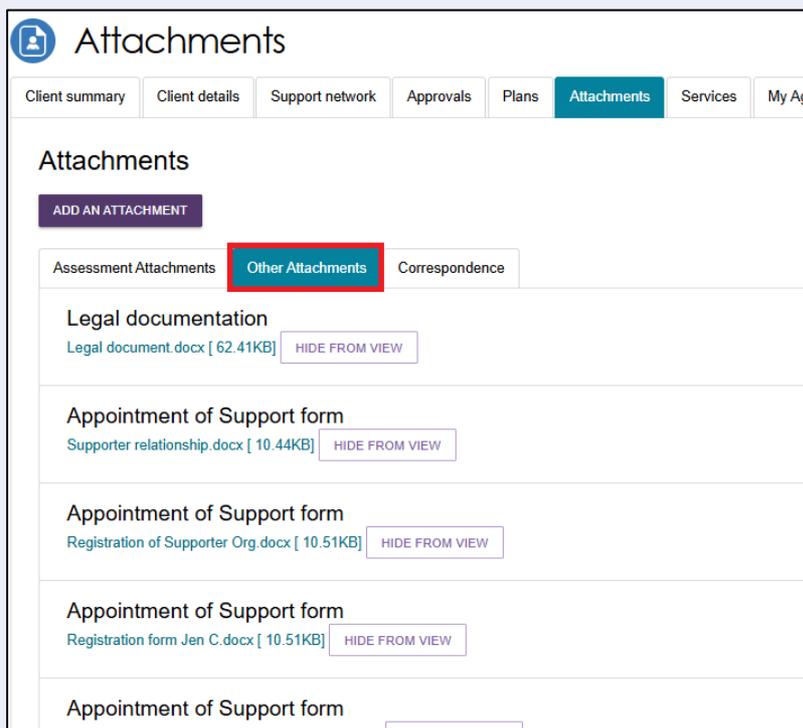
Sensitive attachments are not visible through the My Aged Care online account and will be visible only to assessors and My Aged Care contact centre staff.

4. Your attachment will appear in the **Assessment Attachment** tab, or the **Correspondence** tab.



The screenshot shows the 'Attachments' page in the My Aged Care system. The 'Attachments' tab is selected and highlighted in red. Below the tabs, there is a purple 'ADD AN ATTACHMENT' button. Underneath, three tabs are visible: 'Assessment Attachments' (highlighted in red), 'Other Attachments', and 'Correspondence'. The main content area lists three attachments: 'Care Plan' (Care Plan [docx 10.42KB] with a 'HIDE FROM VIEW' button), 'Action Plan - External' (Budget Plan.docx [10.42KB]), and 'Ineligible for Assessment Ltr' (Assessment letter.docx [4.84KB] with a 'HIDE FROM VIEW' button).

5. Sensitive attachments will appear in the **Other Attachments** tab.

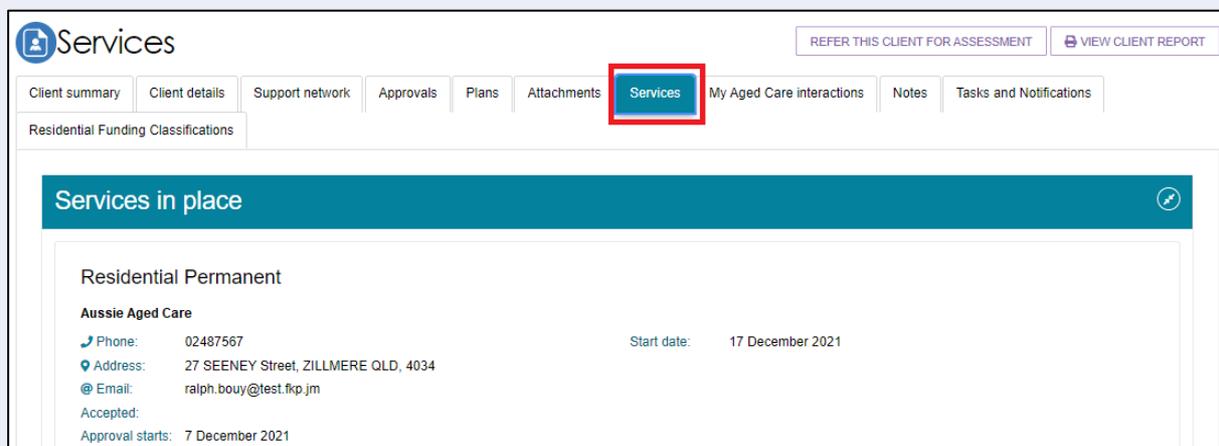


The screenshot shows the 'Attachments' page in the My Aged Care system. The 'Attachments' tab is selected. Below the tabs, there is a purple 'ADD AN ATTACHMENT' button. Underneath, three tabs are visible: 'Assessment Attachments', 'Other Attachments' (highlighted in red), and 'Correspondence'. The main content area lists five attachments: 'Legal documentation' (Legal document.docx [62.41KB] with a 'HIDE FROM VIEW' button), 'Appointment of Support form' (Supporter relationship.docx [10.44KB] with a 'HIDE FROM VIEW' button), 'Appointment of Support form' (Registration of Supporter Org.docx [10.51KB] with a 'HIDE FROM VIEW' button), 'Appointment of Support form' (Registration form Jen C.docx [10.51KB] with a 'HIDE FROM VIEW' button), and 'Appointment of Support form' (Registration form Jen C.docx [10.51KB] with a 'HIDE FROM VIEW' button).

The Services tab

The **Services** tab provides a central view of the client's current and past interactions with aged care services. It helps assessors track referrals, service uptake, and provider engagement. This section is crucial for ensuring service continuity, preventing duplication of referrals, and monitoring whether the client is receiving appropriate support based on their assessed needs.

1. Select the **Services** tab to navigate to the services page of the client record.



The screenshot shows the 'Services' tab selected in the client record interface. The 'Services' tab is highlighted with a red box. Below the navigation tabs, there is a section titled 'Services in place' with a search icon. Underneath, there is a card for 'Residential Permanent Aussie Aged Care' with the following details: Phone: 02487567, Address: 27 SEENEY Street, ZILLMERE QLD, 4034, Email: ralph.bouy@test.fkip.jm, Start date: 17 December 2021, and Approval starts: 7 December 2021.

2. The **Services** tab contains sections which host the following records:

- Previous services a client may have received (from other systems). For example, Clients that were transitioned from Short Term Restorative Care services (STRC) can view their STRC approval records and subsidised care records under the **Services from other systems** sub-section.
- **Services that are not yet in place**
- **Services that are currently in place.**

Sections which do not contain any records will not be displayed. Select the expand buttons on the right-hand side of each section header to display the records.



The screenshot shows the 'Services' tab in the client record interface. The 'Services' tab is selected. Below the navigation tabs, there are three expandable sections: 'Services from other systems', 'Services not yet in place', and 'Services in place'. Each section has a search icon and a red expand button on the right-hand side.

The My Aged Care interactions tab

The **My Aged Care Interactions** tab displays the client's history of interactions with My Aged Care. This includes face-to-face appointments with Aged Care Specialist Officers, phone calls with My Aged Care Contact Centre staff, and capturing of consent for call back requests to be sent to Carer Gateway and/or National Dementia Helpline. Through this section, the assessors can stay informed about the client's ongoing involvement with My Aged Care, supports continuity of care, and ensures no important communications are missed or duplicated.

For more information about the Carer Gateway and National Dementia Helpline referrals, go to [My Aged Care – Assessor Portal User Guide 2 – Registering support people and adding relationships](#).

The Notes tab

! Department staff can transfer client records linked to an inactive assessment outlet to an active assessment outlet in the same assessment organisation or to another assessment organisation. This means that you may view client records that were transferred from another assessment outlet. You will view a note of the transfer in the clients My Aged Care record.

1. Select the **Notes** tab to navigate to the notes page of the client record.

The **Notes** tab contains notes that have been created about the client. Assessors can add new notes about the client from this tab.

! It is recommended that Triage Delegates review the notes tab prior to completing the triage process as not all information captured from screening is pre-populated.

! All notes will be subject to Freedom of Information legislation.



My Aged Care contact centre staff, Aged Care Specialist Officers, assessors and service providers can view and add different types of notes about clients through the My Aged Care portals. Assessors can also view and add these notes in the Aged Care Assessor App. Refer to the following tables for information about note types and permissions according to role.

Note Types

This table shows a selection of important note types, their description and example text.

Note type	Description	Examples
Client story	A summary of the client's current circumstances. Assessors, My Aged Care contact centre, service providers and clients can view these notes.	Mrs Jones has just been discharged from hospital and is seeking help at home. She lives with husband and has early onset dementia.
Sensitive notes	Information of a sensitive nature about the client that needs to be available for assessment or provision of some services. A sensitive note will display a flag on the portal for the service provider against the client. They may contact the My Aged Care contact centre or assessor for additional information, which will only be provided to them if relevant to their service provision. This note will not be displayed to service providers or clients in their portals.	Mr Smith is HIV positive. Mrs Johns has an abusive relationship with son.
Preference	Clients stated service provision preferences. Assessors and My Aged Care contact centre staff can view these notes.	Mrs Marten would prefer a Catholic provider. Mr Dobruk is affiliated with the Croatian community.
Observations	Observations from service provider and/or assessor's interactions with the client. Assessors, My Aged Care contact centre staff and service providers can view these notes.	There is a dog on the property. Mrs Shean seems more energetic than she did during my last visit.
Referral Note	Notes accompanying a client's referral. This can be an initial referral, subsequent referral or referral from one assessment outlet to another.	This client record has now been transferred from Outlet A to Outlet B on 01/01/2024.
Other	Additional information about the client. Assessors, My Aged Care contact centre staff, service providers and clients can view these notes. Examples of other notes include: Client Story - Returned mail, Cultural/Religious, History of Experiences, Gender Identity/Sexual Pref notes.	Mrs Jones has planned respite on 01/08/2017.

Note Add & View permissions

The below table shows each role in the assessor portal and their permissions to add or view a selection of note types.

Role	Add Note Types	View Note Types
Assessors	All	All
Service Providers	Observations Other	Other Client Story Observations Sensitive (Flag only, no content)
Clients (and their support network)	Other	Other Client Story
My Aged Care Contact Centre Staff	Client Story, Sensitive Notes, Preference, all "Other" notes except Observations.	All
Aged Care Specialist Officers (Face to face support in Services Australia centres)	All	All

! When My Aged Care contact centre staff or assessors add a **sensitive** note about a client, all service providers who are sent a referral will view 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 assessor for more information.

Adding client notes

The following section outlines how to add client notes using the assessor portal. For instructions on how to add notes in the Aged Care Assessor App, please refer to the [Aged Care Assessor App User Guide](#).

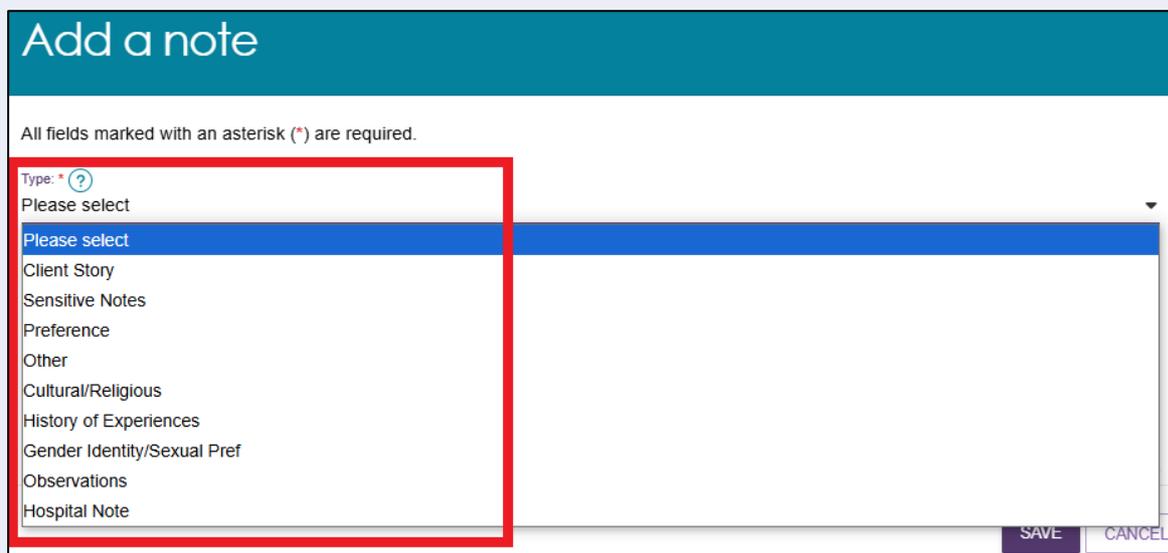
1. Select the **Notes** tab to navigate to the notes page of the client record. Then, select the **ADD NOTE** button to start creating a new note.

The screenshot shows the client record for Mrs Minh CHU. The client details include: Female, 95 years old, 31 January 1930, AC80248081, 7 VICTOR CHANG STREET MACGREGOR, ACT, 2615, Prefers to speak Cantonese, sensitive note. Primary contact: Minh Chu (self), No support relationships recorded.

The 'Notes' tab is highlighted with a red box. Below the tabs, there is a 'Filter by' section with a 'Sort by' dropdown menu set to 'Please select' and a 'GO' button. At the bottom left, the 'ADD A NOTE' button is highlighted with a red box.

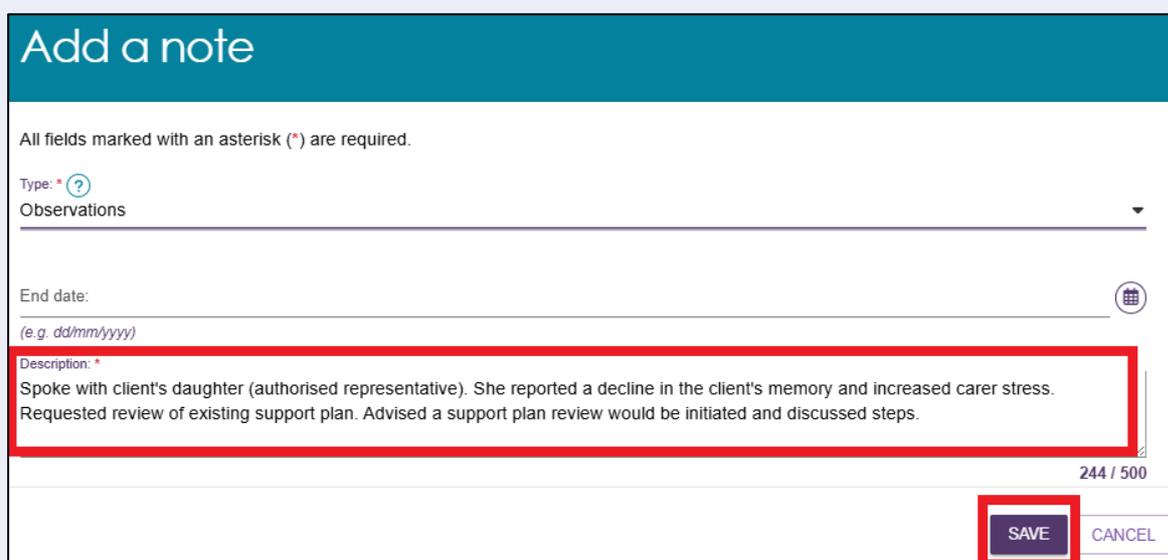
2. A pop-up box will appear. Select the Type of the note you wish to add using the drop-down list, and input the Description (i.e. the content of the note itself). You can hover over the help icon  in the pop-up box for additional information about the different types of notes. If you are unsure which category is most appropriate, please refer to the information in the help icon.

! You cannot delete a note once saved. Quality check that the information is correct before saving.



The screenshot shows the 'Add a note' form with the 'Type' dropdown menu open. The dropdown menu lists the following options: Please select, Client Story, Sensitive Notes, Preference, Other, Cultural/Religious, History of Experiences, Gender Identity/Sexual Pref, Observations, and Hospital Note. The 'Type' field is marked with an asterisk and a help icon. The 'SAVE' and 'CANCEL' buttons are visible at the bottom right of the form.

3. Select **SAVE** to finish your note.



The screenshot shows the 'Add a note' form with the 'Type' dropdown menu set to 'Observations'. The 'Description' field is filled with the following text: 'Spoke with client's daughter (authorised representative). She reported a decline in the client's memory and increased carer stress. Requested review of existing support plan. Advised a support plan review would be initiated and discussed steps.' The 'SAVE' button is highlighted with a red box. The 'End date' field is empty, and the character count '244 / 500' is visible at the bottom right of the description field.

Viewing and editing client notes

The following section outlines how to view and edit client notes using the assessor portal. For instructions on how to view and edit notes in the Aged Care Assessor App, please refer to the [Aged Care Assessor App User Guide](#).

1. Select the **Notes** tab to navigate to the notes page of the client record. Then, select the **Edit** (pencil) icon to the right of the note you wish to edit. Note that there is no Edit icon available for Client Story notes.

Date created	End date	Note type	Description	Created by organisation	Created by outlet	Note status
23/05/2025		Observations	Spoke with client's daughter (authorised representative). She reported a decline in the client's memory and increased carer stress. Requested review of existing support plan. Advised a support plan review would be initiated and discussed steps.	GRAZIER AGED CARE ORG LTD	GRAZIER AGED CARE - ACA - ACT	Active
23/05/2025		Sensitive Notes	GP advised client's health is deteriorating and palliative care may be appropriate. Discussed with client and family, who are open to support. Initiated referral to palliative care team and updated support plan accordingly.	GRAZIER AGED CARE ORG LTD	GRAZIER AGED CARE - ACA - ACT	Active
28/01/2025		Other	Conducted in-home assessment. Client lives alone and reports increasing difficulty with mobility and meal preparation. Uses a walking stick and has a history of falls. Support plan developed to include domestic assistance, meals support, and home modifications referral. Client agrees with recommendations.	System	System	Active

2. A pop-up box will appear. To make a note **Active** or **Inactive**, use the drop-down list to select the desired status. Then, select **SAVE** to finish your note.

Edit a note

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

Type: Other

Status: *
Active

Date created: 28/01/2025 10:57:54 AM

End date: 📅
(e.g. dd/mm/yyyy)

Description: *
Conducted in-home assessment. Client lives alone and reports increasing difficulty with mobility and meal preparation. Uses a walking stick and has a history of falls. Support plan developed to include domestic assistance, meals support, and home modifications referral. Client agrees with recommendations!

306 / 500

Created by: System, System

SAVE
CANCEL

3. Client **Story notes** can also be viewed by assessors in the **Assessments** section of the assessor portal. Select the link to the **Assessments** section of the assessor portal at the very top the page. Then, select expand a client summary using the expand icon on the left of the row.

Minh CHU

Aged 95 (31 January 1930), Female

Referred from Aged Care Gateway on 28 January 2025
Accepted on 5 February 2025

Preferences
No preference was recorded

Assessment details

Assessment type: Comprehensive

Assessment reason: the client has needs that exceed a basic support programme

Assessment setting: Non-Hospital

Assessor: Africa Green

Triage conducted by: Africa Green

Support plan: 5 February 2025 🔍

Comprehensive Assessment: 5 February 2025 🔍

Latest screening: 28 January 2025 🔍

Client story 📝

23/05/2025

Client is 95 year old female alert oriented and self directing with some input from daughter. DX: CVA 9/09 DM, HTN, early stage dementia, hyperlipidemia, heart murmur, R bundle branch lock, UTI (resolved) lives with daughter and son-in-law. Daughter provides 24 hour supervision and is primary caregiver. Sensory vision with glasses, somewhat hard of hearing, speech is clear with mild dysphasia, ambulates with cane or rolling walker independently, sometimes needs supervision.

VIEW ALL 1 CLIENT NOTES

Comments

VIEW FULL CLIENT RECORD
VIEW CLIENT REPORT

! In order to ensure records are never lost, assessors and providers cannot edit the contents of a **client story** note once it is created. Instead, assessors and providers can make the original note **Inactive** and create a new one in its place.

If there are errors in the information which you are concerned about being on the records, contact the My Aged Care service provider and assessor helpline on 1800 836 799.

The Tasks and Notifications tab

All tasks and notifications relevant to the client will be displayed in this page. Assessors will be able to view all tasks and notifications relevant to the client. Providers will only be able to view tasks or notifications that are associated to their assessment outlet, for clients that they are providing services to. Select the **Tasks and Notifications** tab to navigate to the interactions page of the client record.

Type	Due Date	Received Date	Category	Title/Description	Channel	Activity Id	Portal	Outlet
Notification		09/05/2025	Delegate Decision	Delegate Decision An assessment has been submitted for Delegate Decision. Details are as follows - Aged Care User Id: AC42760058 Assessor:Almca Green Go to: Decisions		2-159893433262	Assessor Portal	
Notification		09/05/2025	Referrals	New Referral You have a new referral from My Aged Care. Referral created at 09/05/2025 14:22 for Aged Care User Id: AC42760058 Outlet name:GRAZIER AGED CARE - ACA - ACT Assesment Type:Comprehensive Assessment Priority:Low Go to: Incoming Referrals		2-159893432942	Assessor Portal	GRAZIER

For a complete view of all tasks and notifications, refer to the **Tasks and Notifications** tile assessable from the assessor portal front page.

The Residential Funding Classifications tab (clinical needs assessors)

Residential Funding Classifications are part of the Australian National Aged Care Classification (AN-ACC) system, designed to replace the Aged Care Funding Instrument (ACFI) for the purposes of allocating government funding for residential aged care. Clinical needs assessors can view the clients current AN-ACC classification, and classification history using this tab.

Select the **Residential Funding Classifications** tab to navigate to the classifications page of the client record. For more information about the Residential Funding Classifications refer to the [residential aged care funding reform page](#) on the Departments website.

Current Classification (Active)	Classification History
Residential Respite 6 September 2022 - Present AN-ACC Classification : Class 102	Residential Respite <ul style="list-style-type: none">AN-ACC Classification : Class 102 (Active) : 6 September 2022 - PresentAN-ACC Classification : Class 103 (Inactive) : 15 June 2022 - 5 September 2022AN-ACC Classification : Class 102 (Inactive) : 13 June 2022 - 14 June 2022AN-ACC Classification : Class 102 (Inactive) : 9 June 2022 - 12 June 2022AN-ACC Classification : Class 100 (Inactive) : 8 June 2022 - 8 June 2022

More Information

For further assistance, you can call the My Aged Care service provider and assessor helpline on 1800 836 799.

