



Assessor Portal User Guide 8 - Referring for services

A client may require services to support their needs as a result of an assessment.

Aged care needs assessors (assessors) may refer the client (with consent) for service recommendations made in the client’s support plan, based on the client’s preferred service provider (or prioritised list of service providers) and location preferences.

They can then send electronic referrals for services or provide the client with a referral code that allows them to visit providers prior to selecting their preferred provider.

! **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 issuance of referral code(s) and support plan finalisation from 1 November 2025, refer to *Manual Delegate Approval for CHSP – Standard Operating Procedure* and instructional videos for comprehensive and home support assessments. This is available from your Assessment Organisation (via *Assessment and the new Aged Care Act* Sharepoint page).

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Referral Types

For service recommendations made in the client's support plan, you can search for and match a client to a preferred service provider (or prioritised list of service providers) based on the client's preferred location and/or preferences.

! You must obtain consent from the client and/or their supporter guardian prior to issuing a referral. This is complete by using the referral for services components of the My Aged Care Assessment Consent Form, which is available for download in the Documents & Reports tile in the My Aged Care assessor portal (assessor portal).

There are three types (modes) of referrals. You can:

- send a Sequential referral for service
- send a Broadcast referral for service, or
- provide the client with a referral code that allows them to visit providers prior to selecting their preferred provider.

You can also decline to refer, by issuing a "No Care Approval".

! **For CHSP only:** From 23 Feb 2026 for a Comprehensive Assessment, when a CHSP service is recommended, No Care Approval cannot be recommended and an error message will be displayed.

If No Care Approval is recommended, CHSP services cannot be recommended so the button to add CHSP services will not be displayed.

Sequential Mode

The assessor will send the client's referral to their chosen provider/s in the order of their preference. The client can limit their preference to one or more providers. If their first preference is not available, the referral is automatically sent to the next preference.

! From 1 November 2025, All Residential Permanent service referrals are only sent via Broadcast mode.

Broadcast Mode

The assessor will send the client's referral to all available providers. In agreeing to a broadcast referral, multiple providers could contact the client to see if they can provide them with the service/s. If a provider accepts their referral, the other provider/s will no longer see their information.

Referral Codes

For **residential aged care services**, assessors will normally generate a referral code for the client rather than issuing an electronic referral to service through the assessor portal. If a client has indicated preference or has been in discussions with particular provider/s, assessors can issue an electronic referral.

For **Support at Home**, once a client is assigned a Home Support service from the Support at Home Priority System, they will also be assigned a referral code. This code will be mailed to the

client with their service assignment/upgrade letter. Alternatively, assessors can provide this code (available in the client's support plan) to the client to allow them to visit Support at Home program providers prior to selecting their preferred provider. In addition, where the client has indicated a preference or discussed options with a Support at Home provider, assessors can issue an electronic referral.

No Care Approval

If you have recommended 'No Care Approval' due to the client withdrawing their application for care or not wishing to apply for care under the Act, you can select **COMPLETE SUPPORT PLAN AND CONTINUE TO MATCH AND REFER** from any tab in the client's support plan.

COMPLETE SUPPORT PLAN AND CONTINUE TO MATCH AND REFER

! From 1 November 2025, there are changes to how the No Care Approval option is used under the interim Manual Delegate Approval process for CHSP only approvals for comprehensive assessments.

For more information on the detailed interim process, please refer to *Support at Home – Manual Delegate Approval for CHSP – Standard Operating Procedure* and instructional videos for comprehensive assessments. This is available from your Assessment Organisation (via *Assessment and the new Aged Care Act* Sharepoint page).

Issuing a referral for service

! PRIOR CONSENT REQUIRED

You must obtain consent from the client or their supporter guardian in their support network prior to issuing a referral. You should use the My Aged Care Assessment Consent. The Consent includes the consent scripts and fields to record the consent for service referrals. It is located via the Reports and documents tile within the assessor portal.

1. When you have finished developing the support plan with the client, select **COMPLETE SUPPORT PLAN AND CONTINUE TO MATCH AND REFER**.

The screenshot shows the My Aged Care assessor portal interface. At the top right, there is a link for "View support network". Below this, there is a button labeled "ADD A GOAL". A goal is listed: "Goal: To be able to perform household tasks". Underneath, there is a section titled "Other recommendations" with four buttons: "ADD A GENERAL RECOMMENDATION", "ADD A SERVICE RECOMMENDATION", "RECOMMEND A PERIOD OF LINKING SUPPORT", and "RECOMMEND A PERIOD OF REABLEMENT". Two recommendations are shown: "Recommend that the client receive Allied health and therapy" (dated 21 May 2025) and "Recommend that the client receive Comprehensive Assessment". At the bottom, there are two buttons: "COMPLETE SUPPORT PLAN AND CONTINUE TO MATCH AND REFER" (highlighted with a red box) and "RETURN TO CLIENT".

- You will be taken to the **Manage services & referrals** tab. The services added in the **Goals and recommendations** tab of the support plan will be displayed under **Services not yet in place**. Select **FIND PROVIDERS** to search and create electronic referrals for services.

Services not yet in place

Help at Home

Deselect all Help at Home

Domestic assistance ● Low ● Not actioned

No associated goals
Recommended By: Obadiah Edmondson
User Type: Assessor

FIND PROVIDERS ISSUE REFERRAL CODE REMOVE THIS SERVICE RECOMMENDATION

Below is an example of a client assessed for Support at Home services:

ters to speak Vietnamese No support relationships recorded

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

Services not yet in place

Support at Home ● Funding pending

Support at Home ● Funding pending

Home support Ongoing - SaH Classification 8
• Funding pending
Assistive technology Short-term - AT Medium
• Funding pending
Home modifications Short-term - HM Medium
• Funding pending

No associated goals
Recommended By: Africa Green
User Type: Assessor

SEE SERVICE DETAILS

REQUEST/CHANGE NOTIFICATION OF HOME CARE/SAH CORRESPONDENCE **FINALISE SUPPORT PLAN** RETURN TO CLIENT

- To search for multiple services at the same time, select the services you wish to search for and click **FIND HELP AT HOME PROVIDERS**.

Deselect all Help at Home

Domestic assistance ● Medium ● Not actioned

• General house cleaning
• Laundry services
• Shopping assistance

Associated with goal(s): To be able to perform household tasks
Recommended By: Obadiah Edmondson
User Type: Assessor

FIND PROVIDERS ISSUE REFERRAL CODE REMOVE THIS SERVICE RECOMMENDATION

Allied health and therapy ● Low ● Not actioned

No associated goals
Recommended By: Obadiah Edmondson
User Type: Assessor

FIND PROVIDERS ISSUE REFERRAL CODE REMOVE THIS SERVICE RECOMMENDATION

FIND HELP AT HOME PROVIDERS



4. A page will be displayed that displays the services you ticked in the previous step. It allows you to enter the search criteria for the service. Depending on the service type you are searching for, the search criteria may include, but not necessarily be limited to, the following:

- The list of services that are available for the service type selected, to further refine the search for a specific client need. For example, the 'shopping assistance' service under the 'Domestic assistance' service type.
- The client's service delivery address for location-based searches
- Preferred service delivery setting: client location or service provider location
- Direct search for service providers by name or by proximity on a map.

Depending on the service selected, a location search may either be region/area based (e.g. domestic assistance services delivered to the client's home) or proximity based (e.g. a centre or facility).

Detailed search options are available, including whether the client has previously received services with the service provider, or any specialisations required to cater for a client's diverse or specialised needs.

The screenshot shows a web interface titled "Choose service provider for Larry Yindi". At the top, there are navigation tabs: "Identified needs", "Goals & recommendations", "Decisions", "Manage services & referrals", "Associated People", and "Review". Below this is a "Service Finder" section. It includes a note: "All fields marked with an asterisk (*) are required." and a section "Locate these services:" with a dropdown menu currently showing "Residential Respite Care" and "No associated goals". Below that, there are radio buttons for "Using this location or service provider name:" with options: "Use the client's address", "Enter a suburb/postcode", "Enter a service provider name", and "Select a location". There are two sections of checkboxes: "Diverse needs:" and "Specialised services:". The "Diverse needs" section includes checkboxes for: "Aboriginal and/or Torres Strait Islander peoples and communities", "People who live in rural or remote areas", "Veterans", "Care-leavers", "Lesbian, gay, bisexual, transgender and intersex people", "Culturally and linguistically diverse", "Financially or Socially disadvantaged people", "Homeless or at risk of becoming homeless", and "Parents separated from their children by forced adoption or removal". The "Specialised services" section includes checkboxes for: "Dementia", "Caters for cultural, spiritual or ethical food requirements", and "Terminal illness". There is a "Preferred language chosen:" section with a text input field for "Preferred client language" and a "+" button. At the bottom, there are checkboxes for "Using the following advanced options:" with options: "Previously used by client" and "Show only funded services". At the very bottom, there are two buttons: "SEARCH" (highlighted with a red box) and "CANCEL".

5. For Support at Home services, you are able to search for service providers by specific attributes including Diverse needs, Specialised services, Language, Culture, Religion, Out of Hours service and Case management availability.

Service Finder

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

Locate these services:

Domestic assistance

Shopping assistance General house cleaning
 Laundry services

No associated goals

Using this location or service provider name*
 Use the client's address Enter a suburb/postcode Enter a service provider name Select a location

Client address
 225 4 ROCKY POINT Road
 RAMSGATE NSW 2217

Diverse needs: (?)

Aboriginal and/or Torres Strait Islander peoples and communities
 People who live in rural or remote areas
 Veterans
 Care-leavers
 Lesbian, gay, bisexual, transgender and intersex people
 Special focus on people with a terminal illness

Culturally and linguistically diverse
 Financially or Socially disadvantaged people
 Homeless or at risk of becoming homeless
 Parents separated from their children by forced adoption or removal
 Specific services for people with dementia

Specialised services: (?)

Dementia Terminal illness
 Caters for cultural, spiritual or ethical food requirements

Preferred language chosen:
 Preferred client language

Enter the search criteria. Some further criteria display, depending on previous selections, such as how a service is delivered. Then, select the **SEARCH** button.

Service Finder

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

Locate these services:

Multi-Purpose Service - Residential
 No associated goals

Using this location or service provider name*
 Use the client's address Enter a suburb/postcode Enter a service provider name Select a location

Enter suburb or postcode and select from the list below*
 RUSSELL, ACT, 2600

That will be delivered* In a centre/facility environment
 Within km of the centre/facility

Diverse needs: (?)

Aboriginal and/or Torres Strait Islander peoples and communities
 People who live in rural or remote areas
 Veterans
 Care-leavers
 Lesbian, gay, bisexual, transgender and intersex people

Culturally and linguistically diverse
 Financially or Socially disadvantaged people
 Homeless or at risk of becoming homeless
 Parents separated from their children by forced adoption or removal

Specialised services: (?)

Dementia Terminal illness
 Caters for cultural, spiritual or ethical food requirements

Preferred language chosen:
 Preferred client language

Using the following advanced options:

Previously used by client Show only funded services

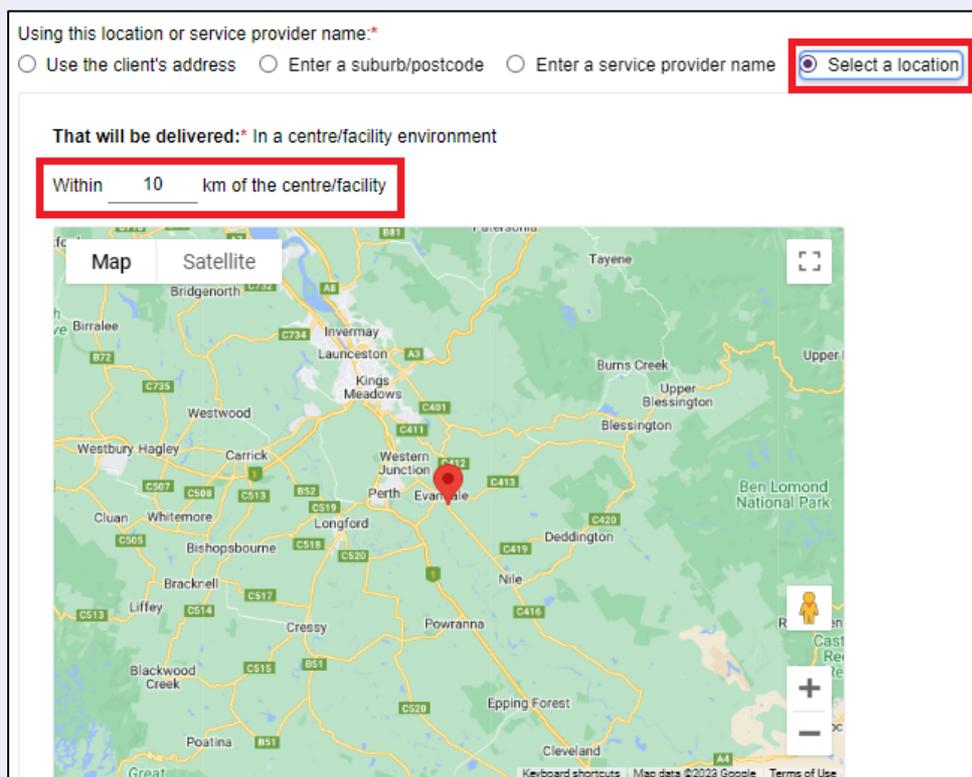
SEARCH CANCEL



- When searching for services provided at a centre/facility, assessors are also able to select a location on a detailed visual map when matching and referring a client for service.

Select a location on the map by placing a pin, this pin may be moved to select a different location, and assessors can navigate around the map to view areas adjacent to the one currently displayed.

When searching by using the map functionality, the search results displayed will contain a list of service providers who provided services at a service delivery address within the search radius entered.



- View the search results. The search results will be sorted to display the most relevant service providers first or randomised in the case of equal relevance.

By default, you will be able to view the search results of service providers plotted on a detailed, interactive map. You can click **Hide Map** to switch to the list view and click **Show Map** when in the list view to revert to the map view.

The search results will display search results in the following configuration depending on the criteria used when searching for services.

Search method	Service delivery location	Map View	List View
Client Address; or Suburb/Postcode	At Client Location	Outlet Address	Outlet Address
Client Address; or Suburb/Postcode; or Select A Location	At Provider Location	Address where services will be delivered	Outlet Address and service delivery address (under the individual service)
Service provider name	N/A	Map will be hidden for all services except Residential Care services	Outlet Address and service delivery address (under the individual service)

As services can be offered at both provider and client location in a service delivery outlet (with the exception of residential care services) the map will be hidden when searching by service provider name, as these results will not display consistently on the map.

The availability of services, service sub-types and waitlist options are displayed for each service provider.

MAP VIEW

Service Finder

3 Service Providers found

Sort results by Relevance

HIDE MAP

Hetti Perkins
 2 Percy Court ALICE SPRINGS NT 0870 | 02 1051 1080
 Select Preference
 Residential Respite Care Available Waitlist
 Specialisations

Flynn Lodge
 446 Stuart Highway ALICE SPRINGS NT 0870 | 02 8984 9813
 Select Preference
 Residential Respite Care Available Waitlist

Old Timers
 446 Stuart Highway BRAITLING NT 0870 | 02 8682 9636
 Select Preference
 Residential Respite Care Available Waitlist

Please make sure you have client consent before saving these preferences.
 SAVE SELECTION AND CONSENT CANCEL

Map Satellite
 Searches by location, client address and suburb/postcode will display the address where services will be delivered. Searches for services provided at the client's location will display results based on service delivery outlet address and should only be used as a guide, as the outlet address may not reflect where a service is provided.

LIST VIEW

Service Finder

3 Service Providers found

Sort results by Relevance

SHOW MAP

Hetti Perkins
 2 Percy Court ALICE SPRINGS NT 0870 | 02 1051 1080
 Select Preference
 Residential Respite Care Available Waitlist
 Specialisations

Flynn Lodge
 446 Stuart Highway ALICE SPRINGS NT 0870 | 02 8984 9813
 Select Preference
 Residential Respite Care Available Waitlist

Old Timers
 446 Stuart Highway BRAITLING NT 0870 | 02 8682 9636
 Select Preference
 Residential Respite Care Available Waitlist

Please make sure you have client consent before saving these preferences.
 SAVE SELECTION AND CONSENT CANCEL

- Specialisations can be expanding the arrows next to **service availability** or **Specialisations** to view more detailed information about the services (including availability and wait list availability) and specialised service offerings of each service provider. For Diverse Needs, only verified diverse needs specialisations will be shown.



Service Finder (show search fields)

3 Service Providers found

Hetti Perkins
 2 Percy Court ALICE SPRINGS NT 0870 02 1051 1080

Select	Preference		
<input type="checkbox"/>	1	Residential Respite Care	● Available ● Waitlist
<div style="border: 2px solid red; padding: 2px; display: inline-block;"> Specialisations </div>			

Flynn Lodge
 446 Stuart Highway ALICE SPRINGS NT 0870 02 8984 9813

Select	Preference		
<input type="checkbox"/>	1	Residential Respite Care	● Available ● Waitlist

Old Timers
 446 Stuart Highway BRAITLING NT 0870 02 8682 9636

Select	Preference		
<input type="checkbox"/>	1	Residential Respite Care	● Available ● Waitlist

9. Assessors can access a detailed page that replicates the information on the My Aged Care service finder by selecting the service name hyperlink under the service provider’s name. Assessors can view any regulatory decisions made against the provider by selecting the **Regulatory decisions are available here** hyperlink under the provider’s contact details. For care types under the Act, this page will also include information around the status of the service, costs of service etc. For example, Residential Permanent services outline information around the facility’s accreditation and costs for different room types.

Information details for Welcoming Provider ✖ CLOSE

Welcoming Provider
Previously known as Welcoming House
 Locally Known as Not Supplied

☎ 09 8765 4321
 🌐 www.welcomingprovider.com.au
 ✓ Commonwealth government subsidised
 ✓ Accredited
 ✓ Available

[Regulatory decisions are available here](#)

Description	Services	Costs
Street address 111 Care Avenue ALICE SPRINGS NT, 0870	Business address 111 Care Avenue KILGARRIFF NT, 0873	☎ Phone: 01 2345 6789 📠 Fax: ✉ Email: welcome@welcomingprovider.com.au

Welcoming House is a 40 bed Aged Care Home.

10. The following message will be displayed if an appropriate service provider is not found:

• You searched for HAYMARKET, NSW, 2000 for:
 • Domestic Assistance
 But there were no providers found matching all of the above criteria

- Select the client's preferred service provider(s), ensure that you have the client's consent to send the referrals, and select **SAVE SELECTION AND CONSENT**.
 - For [broadcast referrals](#), set preferences for all service providers to **1st**. In agreeing to a broadcast referral, the client needs to be aware that multiple providers could contact them about their service referral.
 - For [sequential referrals](#), set preferences for service providers in order of the client's preference.

The screenshot shows a user interface for selecting service providers. It lists three providers, all with preference '1' and 'Available' status. A 'SAVE SELECTION AND CONSENT' button is highlighted at the bottom. A map on the right shows the location of the providers in Canberra.

! Waitlisting

If none of the client's preferred service providers are available, they may wish to be placed on a waitlist. The search results will indicate whether a service provider has a waitlist available.

When referrals are sent sequentially and a provider accepts a client on to a waitlist, this will automatically trigger a referral to be issued to the next preference.

Clients may choose to be on multiple waitlists at the same time.

Clients will remain on a provider's waitlist until the provider indicates services are available and accepts the client referral.

The screenshot shows a user interface for selecting service providers. It lists three providers: 'Aged Care Outlet 2' (Available), 'Aged Care Outlet 1' (Not Available with Waitlist), and 'Aged Care Outlet 4' (No Waitlist). A 'SAVE SELECTION AND CONSENT' button is highlighted at the bottom.

- The selected service provider(s) will now display as saved against the recommended service.



Services not yet in place

Help at Home

Equipment and products ● Low ● Not actioned

No associated goals

Recommended By: Africa Green

User Type: Assessor

Selected providers

- Mercy Health Home Care Services Young

SEND REFERRALS CHANGE THIS SELECTION ISSUE REFERRAL CODE REMOVE THIS SERVICE RECOMMENDATION EDIT PREFERENCES

13. To edit or remove existing provider preferences, select **EDIT PREFERENCES**.

Services not yet in place

Help at Home

Equipment and products ● Low ● Not actioned

No associated goals

Recommended By: Africa Green

User Type: Assessor

Selected providers

- Mercy Health Home Care Services Young

SEND REFERRALS CHANGE THIS SELECTION ISSUE REFERRAL CODE REMOVE THIS SERVICE RECOMMENDATION EDIT PREFERENCES

14. To issue electronic referrals, select **SEND REFERRALS**.

Services not yet in place

Help at Home

Equipment and products ● Low ● Not actioned

No associated goals

Recommended By: Africa Green

User Type: Assessor

Selected providers

- Mercy Health Home Care Services Young

SEND REFERRALS CHANGE THIS SELECTION ISSUE REFERRAL CODE REMOVE THIS SERVICE RECOMMENDATION EDIT PREFERENCES

15. Select **CHANGE THIS SELECTION** to choose additional provider preferences.

Services not yet in place

Help at Home

Equipment and products ● Low

No associated goals

Recommended By: Africa Green

User Type: Assessor

Selected providers

- Mercy Health Home Care Services Young

SEND REFERRALS CHANGE THIS SELECTION ISSUE REFERRAL CODE REMOVE THIS SERVICE RECOMMENDATION EDIT PREFERENCES

16. A screen will be displayed for you to review preferences and capture any other information relevant to the service provider prior to issuing the referrals. You can also **REMOVE** a service provider in this screen by ticking the relevant checkbox. Once all information has been reviewed, select **SEND REFERRALS**.



17. You will receive a confirmation message that referrals have been sent. You will also be able to see a visual indicator of the status of the referrals.

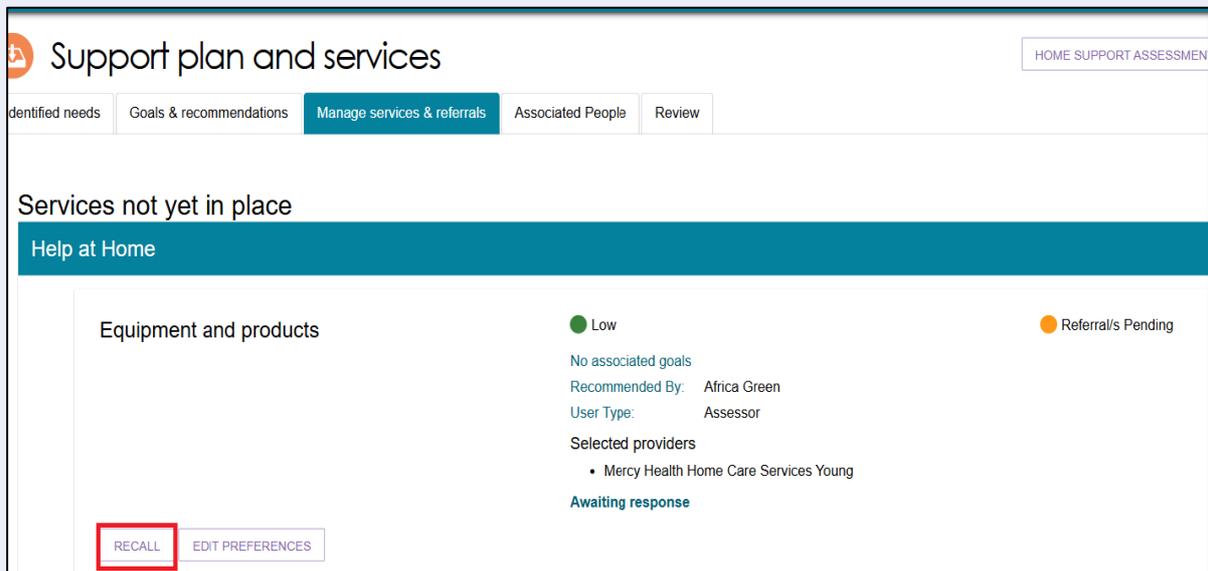
18. Once the referral has been accepted, the service will be displayed under **Services in place**. The referral statuses that will display are:

Category	Status
Service not yet in place	Not actioned, Rejected referral, Recalled referral, Referral/s pending, Accepted to waitlist
Services pending	Referral code generated, Referral accepted but services have not commenced
Service in place	Services are being provided
Home Care	Package Unassigned, Package Assigned, Package Committed, Package Withdrawn, Package Declined.

Recalling a referral

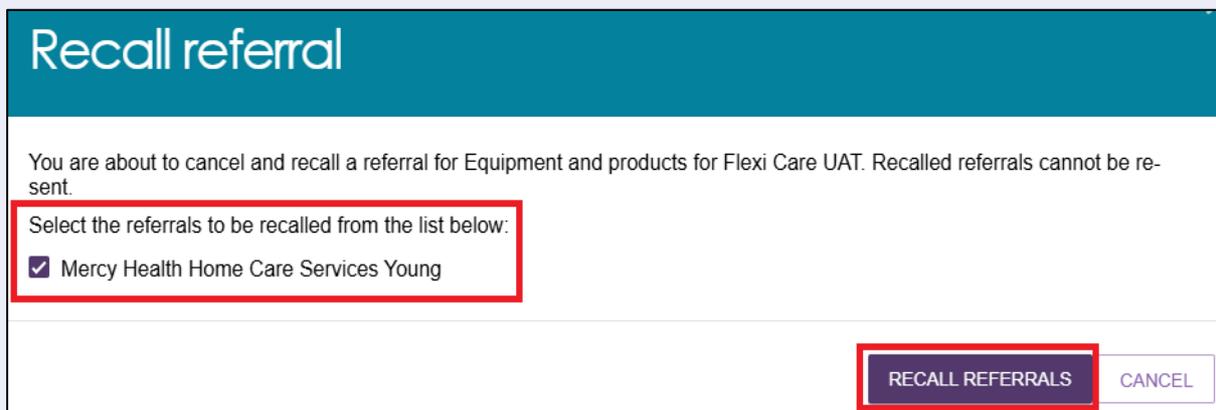
When a referral for service is issued, it is expected that the service provider will action the referral by accepting or rejecting it. You can recall the referral before the service provider actions it.

1. On the **Manage services & referrals** tab, select the **RECALL** button to recall the referral.



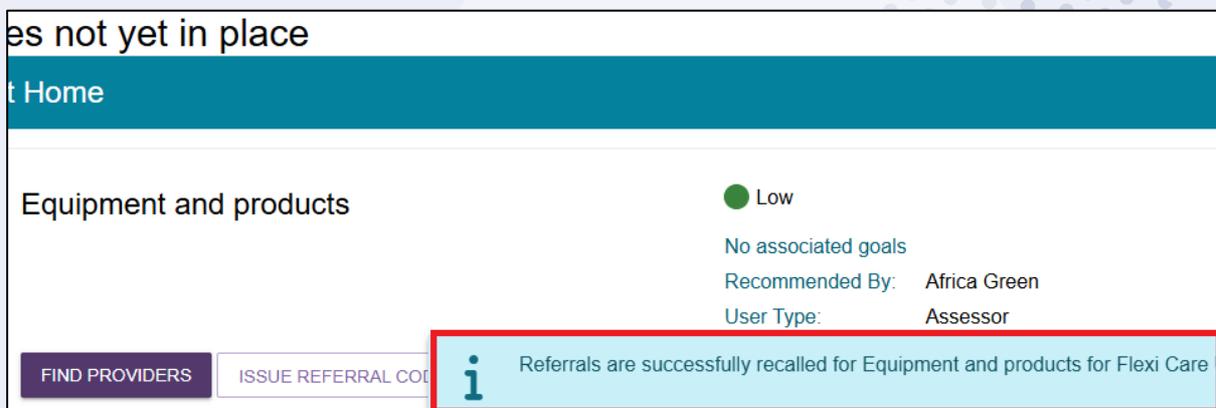
The screenshot shows the 'Support plan and services' interface. The 'Manage services & referrals' tab is active. Under the 'Services not yet in place' section, the 'Help at Home' category is expanded to show 'Equipment and products'. The status is 'Low' (green dot) and 'Referral/s Pending' (orange dot). Details include: 'No associated goals', 'Recommended By: Africa Green', 'User Type: Assessor', and 'Selected providers: Mercy Health Home Care Services Young'. The status is 'Awaiting response'. The 'RECALL' button is highlighted with a red box.

A pop up box will be displayed. Select which provider to recall the referral from and select **RECALL REFERRALS**.



The 'Recall referral' pop-up box contains the following text: 'You are about to cancel and recall a referral for Equipment and products for Flexi Care UAT. Recalled referrals cannot be re-sent. Select the referrals to be recalled from the list below: [checked] Mercy Health Home Care Services Young'. The 'RECALL REFERRALS' button is highlighted with a red box.

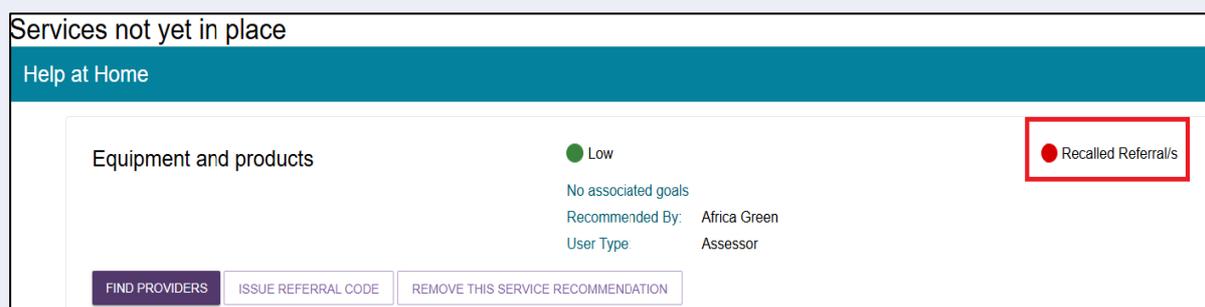
2. You will receive a banner confirming that the referral/s are successfully recalled.



The screenshot shows the 'Support plan and services' interface. The 'Equipment and products' section is highlighted. The status is 'Low' (green dot). Details include: 'No associated goals', 'Recommended By: Africa Green', and 'User Type: Assessor'. A blue information banner at the bottom states: 'Referrals are successfully recalled for Equipment and products for Flexi Care'. The banner is highlighted with a red box.

3. The referral status will be updated to **Recalled Referrals**. In the case of sequential preference referrals, the status of the referral will not change to **Recalled Referrals** until the

final preference has been recalled. If you recall a referral, you cannot send it to the same provider again. You can send referrals to different providers for that service.

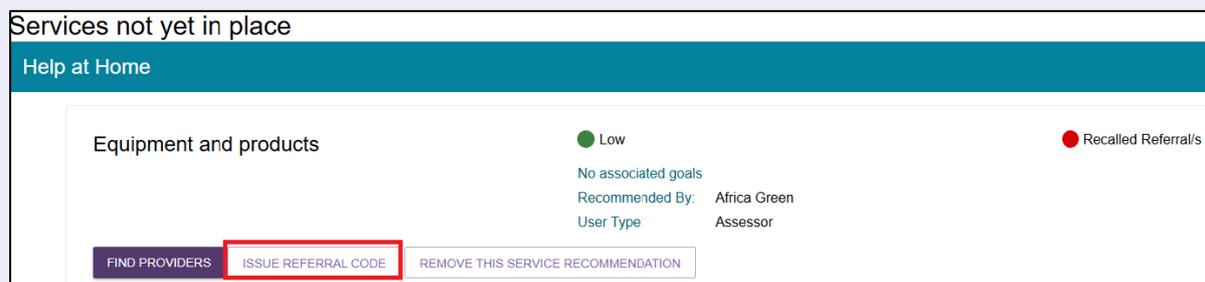


Issuing a referral code

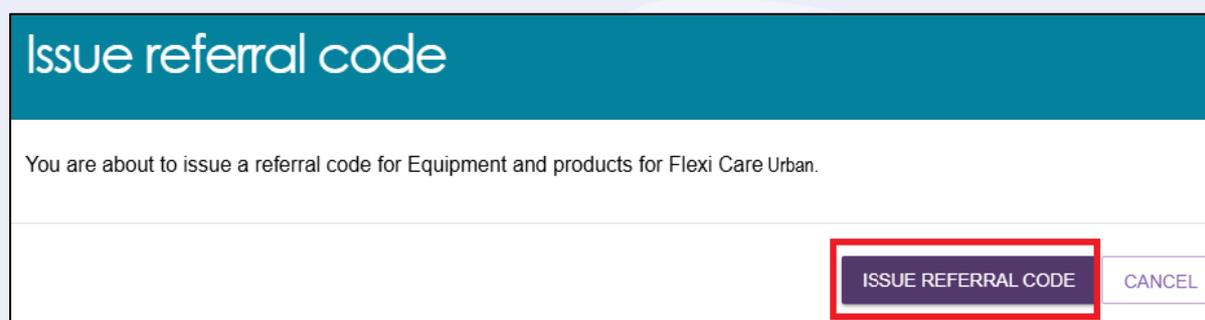
! Assessors cannot issue referral codes to the older person or service providers for all service referrals (including for CHSP) until after the Assessment Delegate has completed and signed a Notice of Decision.

For more information, please refer to *Chapter 9: Finalising the Assessment and Service Referral* of [My Aged Care Assessment Manual](#).

1. Select the **Manage services & referrals** tab from the client's Support Plan and select **ISSUE REFERRAL CODE** for the service.



2. A confirmation message will be displayed. Select **ISSUE REFERRAL CODE**.



3. You will receive a confirmation message that the referral code has been generated, and the details of the referral will appear under the **Services pending** section. The referral code will be displayed on the referral list, and the referral code letter should be printed and provided to the client.

Services not yet in place

Help at Home

Equipment and products ● Low ● Recalled Referrals

No associated goals
Recommended By: Africa Green
User Type: Assessor

Manual referral code 2-158852738704

FIND PROVIDERS

✓ Referral code successfully generated.

4. Select **GENERATE REFERRAL CODE LETTER** to print the referral code letter.

No associated goals
Recommended By: Africa Green
User Type: Assessor

Manual referral code 2-158852738704

FIND PROVIDERS

National ATSI Aged Care Program ● Low

No associated goals
Recommended By: Africa Green
User Type: Assessor

Selected providers
• Horton House and Warrington Lodge

Awaiting response

RECALL EDIT PREFERENCES

Aged Care Homes

Multi-Purpose Service - Residential ● Low

No associated goals
Recommended By: Africa Green
User Type: Assessor

Manual referral code 2-158852738628

FIND PROVIDERS

GENERATE REFERRAL CODE LETTER

5. A processing window will be displayed indicating the letter being generated.

Generating report. You will be redirected to the Reports page if the request takes longer than expected...

6. The generated report will be available under the **REPORTS AND DOCUMENTS** page ready to be downloaded.

Reports and documents

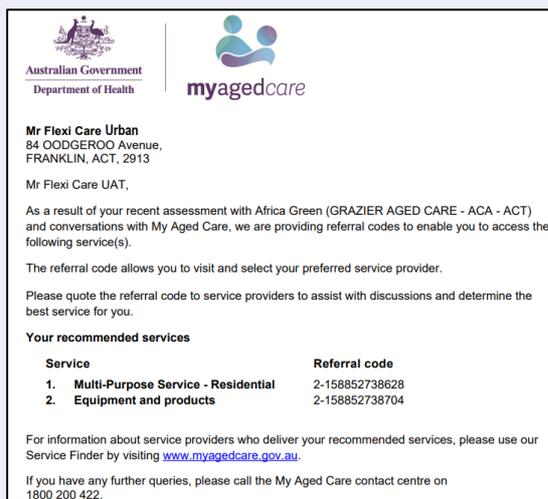
Reports Forms Links

My Reports

Name	Requested Date	Status
Flexi Care Urban Referral Code and List of Providers 21 May 2025	21 May 2025	Ready - View



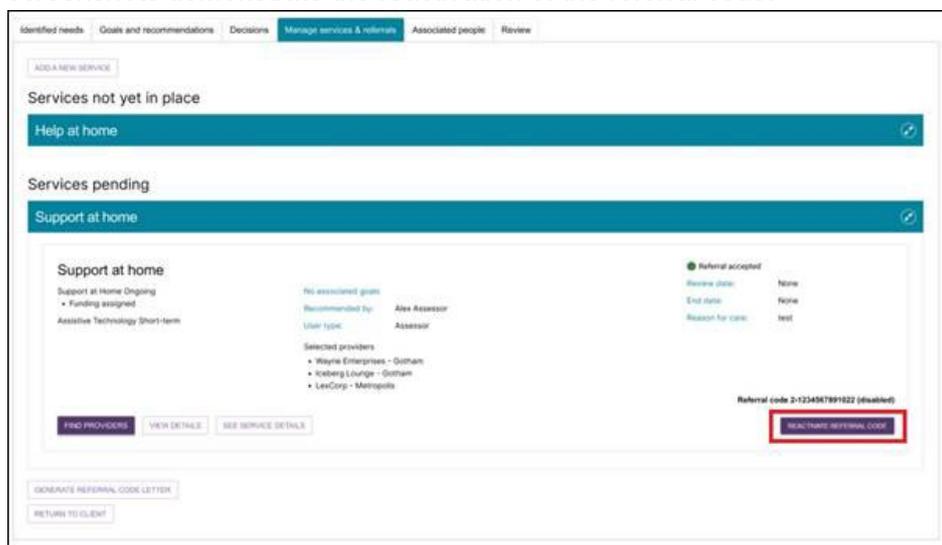
7. Below is a copy of the generated referral code letter.



! A client can change providers without changing their referral code. Against a Support at Home in **Manage Services & Referrals** you will see a status displayed next to the referral code. This could be one of the following:

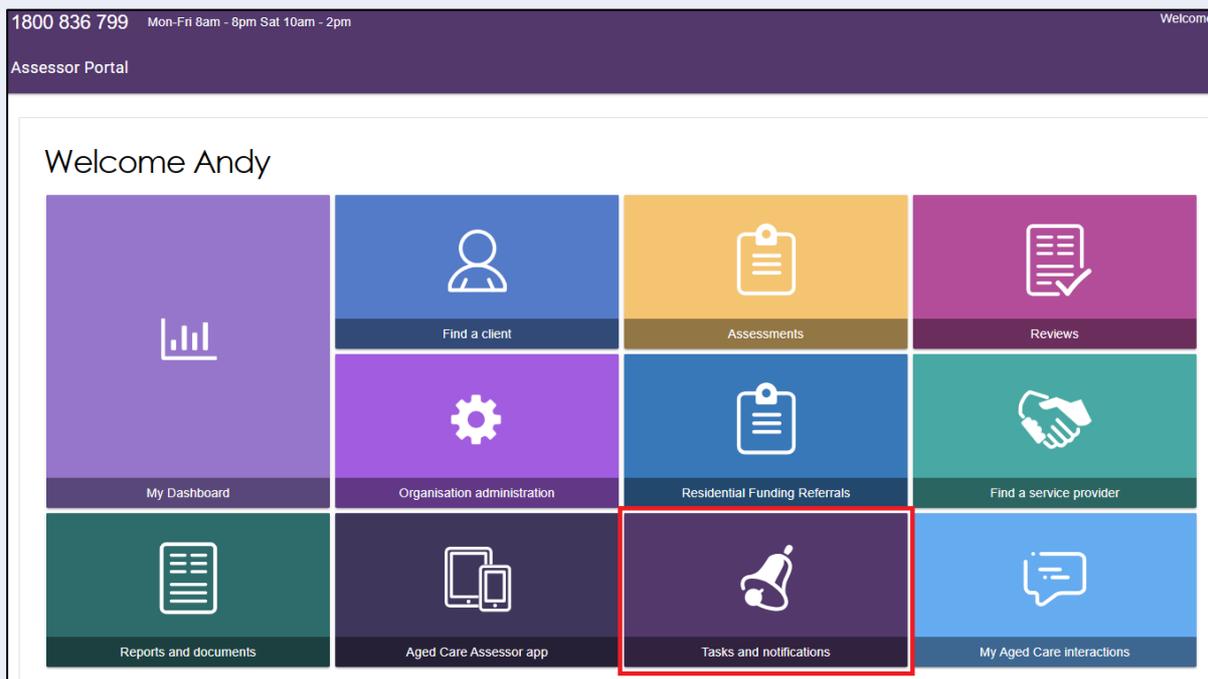
- **Active** – a client is assigned a Support at Home classification, and the referral code can be used.
- **Used** – an old referral code for a previous approval that can no longer be used by the client or the service provider for referrals.
- **Inactive** – this status will display if a client has notified that they are not seeking services and/or has had an assigned Support at Home classification withdrawn and not replaced or upgraded.
- **Disabled** – this status will display once a service referral is accepted. The referral code is disabled and unable to be used by other providers until it is reactivated.

If a client wishes to **reactivate** their referral code, for example they might be changing providers, a client or supporter can do this via the My Aged Care online account or by contacting the My Aged Care contact centre. Clinical assessors can also perform this function in the **Manage Services & Referrals** tab of the support plan. The following screenshots demonstrate the reactivation of the referral code.

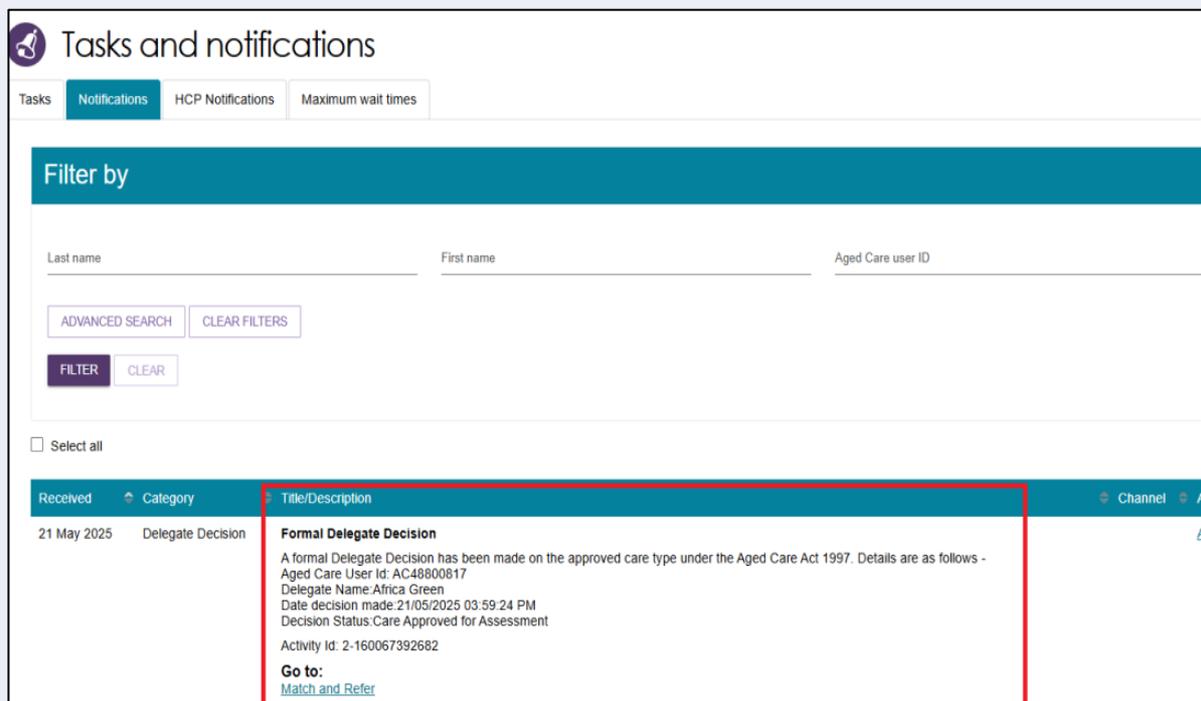


Viewing Delegate decisions

1. Go to the **Tasks and notifications** tile in the assessor portal.



2. Go to the **Notifications** tab, and filter for your client if necessary. A Formal Delegate Decision notification will look like this:



3. Alternatively, go to the Assessments tile of the assessor portal home page. You will be able to see that the Delegate has made a decision in the **Current assessments** tab. The client's assessment will appear under **Delegate decision complete** section in card view, or with a status of **Delegate Decision Complete** in list view.



Current assessments

Current assessments | Recent assessments

CARD | LIST

Filter by

Delegate decision complete

Nova BOND

FRANKLIN, ACT, 2913
Aged care user ID: AC25972829
Date accepted: 12 November 2019

Comprehensive

✓ Delegate Decision Complete | Low

November BOND

FRANKLIN, ACT, 2913
Aged care user ID: AC42520312
Date accepted: 11 November 2019

Comprehensive

✓ Delegate Decision Complete | Low

Referring for Support at Home services

1. Select the **Assessments** tile from the assessor portal home screen.

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

Assessor Portal

Welcome Andy

My Dashboard | Find a client | **Assessments** | Reviews

Organisation administration | Residential Funding Referrals | Find a service provider

Reports and documents | Aged Care Assessor app | Tasks and notifications | My Aged Care Interactions

2. Select a client within your **Current assessments** tab and then go to the client's support plan.



Thomas KK YINDI

Accepted on 1 May 2025

Preferences

No preference was recorded

Completed Support Plan due by 11 May 2025

Assessment details

FNAO-preference No

Assessment type Comprehensive

Assessment reason Self-Referral

Assessment setting Non-Hospital

Assessor Africa Green

Triage conducted by Africa Green



Support plan ● In Progress

Comprehensive Assessment ● In Progress



Client story

No client story was recorded

Comments

[VIEW FULL CLIENT RECORD](#)

[VIEW CLIENT REPORT](#)

Alternatively, you can also go directly to the client's support plan from the **Notifications** tab by selecting on the **Match and Refer** link.

Tasks Notifications HCP Notifications Maximum wait times

Filter by

Last name First name Aged Care user ID

ADVANCED SEARCH CLEAR FILTERS

FILTER CLEAR

Select all

Received	Category	Title/Description	Channel	Aged Care User ID	Client
22 May 2025	Delegate Decision	Formal Delegate Decision A formal Delegate Decision has been made on the approved care type under the Aged Care Act 2024. Details are as follows - Aged Care User Id: AC50689892 Delegate Name: Africa Green Date decision made: 22/05/2025 12:00:00 AM Decision Status: No Care Approved for Assessment Activity Id: 2-16007770259		AC50689892	TIN

Go to: [Match and Refer](#)

3. Select the **Manage services & referrals** tab. The services added in the **Goals and recommendations** tab of the support plan will be displayed under **Services not yet in place**. Select **FIND PROVIDERS** to search and create electronic referrals for services. This only applies for services with funding available.

Services not yet in place

Help at Home

Domestic assistance

- General house cleaning
- Laundry services
- Shopping assistance

Low

No associated goals

Recommended By: Elnaq Gibsone

User Type: Assessor

Not actioned

Recommended service frequency: 3 time(s) per day

FIND PROVIDERS ISSUE REFERRAL CODE REMOVE THIS SERVICE RECOMMENDATION

If funding is not available, you will not be able to find providers.



Services not yet in place

Support at Home

Support at Home

Home support Ongoing - SaH Classification 2
• Funding pending

No associated goals

Recommended By: Elnaq Gibsone

User Type: Assessor

Funding pending

SEE SERVICE DETAILS

4. For Support at Home recommendations, you will be able to send electronic referrals for service when the client has been assigned funding from the Support at Home priority system and the status is **Package Assigned**.

Referring Support at Home services with the Support at Home Priority System

For Home Support services, you will be able to match and refer for service when the client has been assigned a classification from the Support at Home Priority System. On allocation of funding, a referral code is generated, and a letter is sent to the client, with a copy to their supporter/s, instructing them that they can use the referral code to seek services prior to the take-up deadline.

If the client and/or their supporter has elected to receive email notifications, they will also receive an email notification on assignment of their classification.

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

If you have elected to receive notification of Support at Home correspondence for the client, you will receive a notification of this and you can proceed to matching and referral if you wish. All electronic referrals should be issued in the client's support plan under Manage services & referrals.

1. Select the **FIND PROVIDERS** button to search for Support at Home providers. For Home Support services, you can search for service providers by specific service attributes including Diverse needs, Specialised services, Languages, and Cultural and Religion. This can be done by selecting **Advanced search** when selecting a service provider.

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

Assessor Portal My Dashboard Find a client Assessment referrals Review requests Assessments Reviews Organisation administration Residential Funding Referrals **Find a service provider** Reports and documents Aged Care Assessor app Tasks and notifications My Aged Care Interactions Logout

Home | Find a Service Provider

Find a service provider

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

Locate these services:

Select a category *

Support at Home

Select service group(s):

Home modifications

Assistive technology

Home support

Select service types:

Home support

Select service type

Social support and community engagement

ACCOMMODATION SERVICES

Services added

- 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

Using this location or service provider name:

Enter a suburb/postcode

Enter a service provider name

Advanced search

Diverse needs:

Aboriginal and/or Torres Strait Islander peoples and communities

People who live in rural or remote areas

Veterans

Care leavers

Lesbian, gay, bisexual, transgender and intersex people

Culturally and linguistically diverse

Financially or Socially disadvantaged people

Homeless or at risk of becoming homeless

Parents separated from their children by forced adoption or removal

Specialised services:

Dementia

Confidence

Hearing

Respite care

Wellness and rehabilitation

Mental Health

Vision

Terminal illness

Mobility

Assistive Technology

Any providers that offer verified Diverse Needs specialisations, as well as any cultural specialisations and specialised services, will be shown under the Specialisations section of the Service Finder listing.

Home | Find a Service Provider

Cultural:

Preferred culture chosen:

Chinese x

Culture

Religion:

Preferred religion chosen:

Religion

Keyword search:

Keywords

RESET

SEARCH

1 provider matched criteria

Bendigo Health Services - Community Care Mildura - Support at Home

MILDURA
02 2006 6578

Services supported:
All services searched supported



Managing rejected service referrals

To connect clients to appropriate service providers and ensure consistency for clients, any referrals sent by you will be returned to you for actioning if they are rejected and there are no referral preferences for the client remaining.

Where a referral for service is rejected, and it is the client's final preference, assessors will:

- Receive a notification that the referral was rejected (an All Referrals Rejected task); and
- Be able to reissue referrals to different providers or accept a provider's offer to waitlist, based on discussion with the client.

Follow these steps to follow up a rejected referral:

1. Navigate to the **Tasks** tab in the **Tasks and notifications** section and select the **All Referrals Rejected** link to navigate directly to the client's support plan or the Aged Care User ID link to navigate to the client record.

The screenshot shows the 'Tasks and notifications' interface. At the top, there are tabs for 'Tasks', 'Notifications', and 'Maximum HCP wait times'. Below this is a 'Filter by' section. The main table has columns for 'Due Date', 'Category', 'Title/Description', 'Aged Care User ID', 'Client name', and 'Activity Id'. A task is listed with a due date of 12/02/2019, marked as 'Overdue'. The title is 'All Referrals Rejected'. The description includes: 'All referrals for this service have been rejected or revoked. Aged Care User Id: AC25336017. Service Type: Home maintenance. Rejection Reason Other - test other. Assigned to: ASSESSOR, Frank. Go to: All Referrals Rejected'.

Alternatively, if you know the client's name you can view all tasks and notifications for an individual client in the **Tasks and Notifications** tab in the client record.

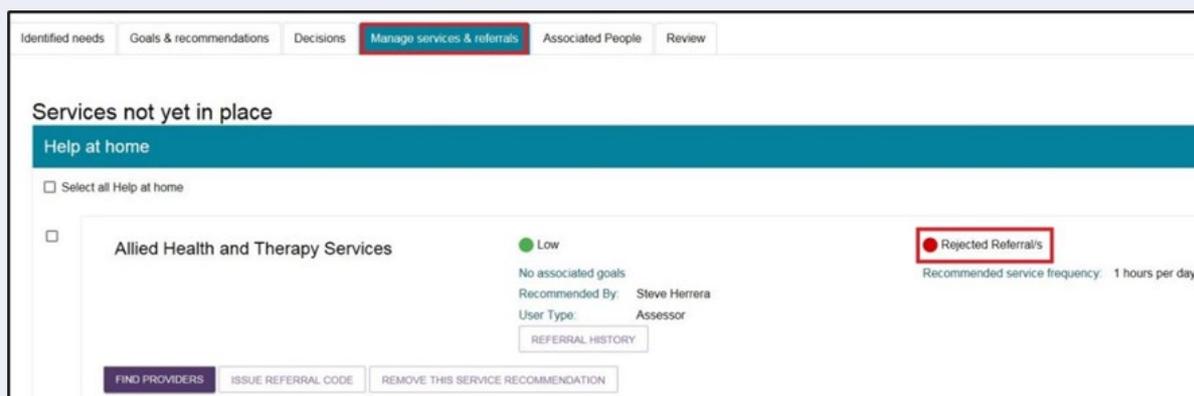
The screenshot shows the 'Tasks and Notifications' tab within a client record. The top navigation bar includes 'Client summary', 'Client details', 'Approvals', 'Plans', 'Attachments', 'Services', 'My Aged Care interactions', 'Notes', and 'Tasks and Notifications'. Below this is a 'Filter by' section. The table lists two items: a 'Notification' dated 11/02/2019 titled 'New Referral' and a 'Task' dated 12/02/2019 titled 'All Referrals Rejected'. The task description is identical to the one in the previous screenshot.

2. If navigating directly from the notification, the **Manage services & referrals** tab in the client's support plan will open, where the rejected service type will be displayed with **Rejected Referrals/s** on the recommendation.

The screenshot shows the 'Services not yet in place' interface. At the top, there is a 'Help at home' section with a checkbox 'Select all Help at home'. Below this is a service recommendation for 'Allied Health and Therapy Services'. The recommendation is marked as 'Low' priority. It includes the text: 'No associated goals. Recommended By: Steve Herrera. User Type: Assessor. Recommended service frequency: 1 hours per day'. There is a 'REFERRAL HISTORY' button. At the bottom, there are three buttons: 'FIND PROVIDERS', 'ISSUE REFERRAL CODE', and 'REMOVE THIS SERVICE RECOMMENDATION'.

You will also be able to see the status of any other of the client's referrals.

3. Navigate to the **Manage services & referrals** tab to see the status of the client's referrals.



For Rejected Referrals, select **Referral history** to see the further detail about the reason the referral was rejected.

4. You can now send referrals to new providers or generate a referral code for the client, following the steps described earlier in this guide. Based on the referral rejection reason, you may be required to add further information to a client's referral or need to discuss alternative options with the client prior to issuing another referral.