

Aged Care Assessor App User Guide

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

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

This user guide has been split into the following sections:

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

! From 29 June 2026, Home Support assessments require delegate approval in the system.

Manual Delegate Approval is no longer required for Home Support assessments.

Assessors should now follow the standard system-based delegate approval process.

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Part A - Needs assessors and RAC funding assessors

1. Introduction

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

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

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

2. Minimum requirements for devices to run the App

The App is supported on the following operating systems:

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

Please note the screenshots in this guide feature the app version 36 on iPadOS 18.7.

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

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

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

3. Setting Up the App

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

- [Download the App](#) from your device's application store.
- Have an active role in the assessor portal (you must ensure your registered email address is current and up to date).
- Have an activation code, that can be obtained either via the App section of the assessor portal or by calling the My Aged Care service provider and assessor helpline (1800 836 799).

The activation code will be active for 24 hours from the time it is issued. If your code expires, select **Get Activation Code** in the App section of the assessor portal or call 1800 836 799 to have another code issued.

For RAC funding assessors, they can call the AN-ACC Operational Support Line on 02 6289 7190 between 8am - 6pm AEST Monday to Friday to request an activation code.

3.1 Downloading and Installing the App

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

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

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

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

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



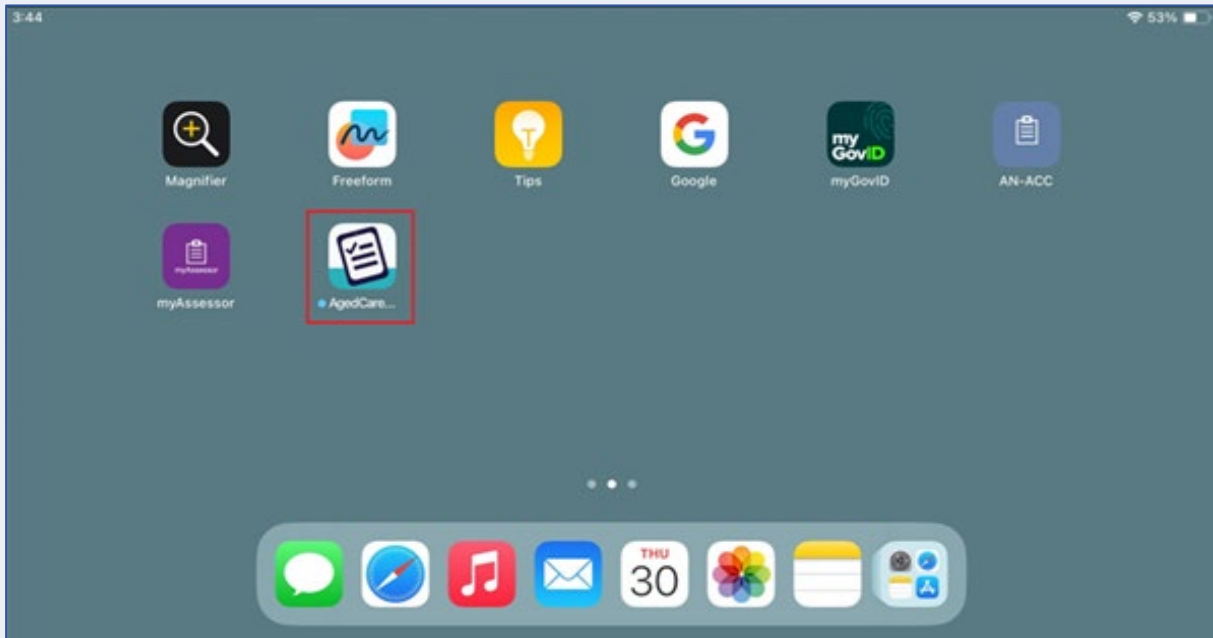
2. Search for the App by entering 'Aged Care Assessor App' in the search box and select the App icon to open the App details.



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

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

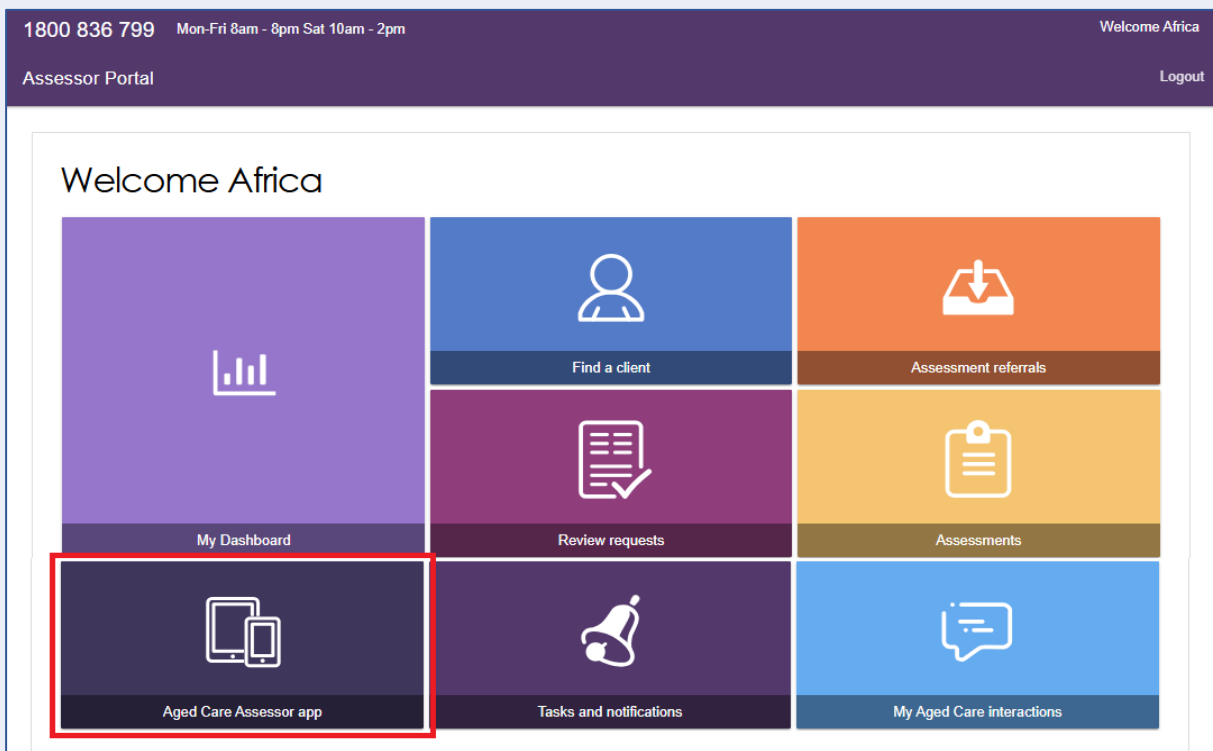
If you have difficulties downloading the App onto your device, contact your organisation administrator or relevant IT area.



3.2 Activating the App

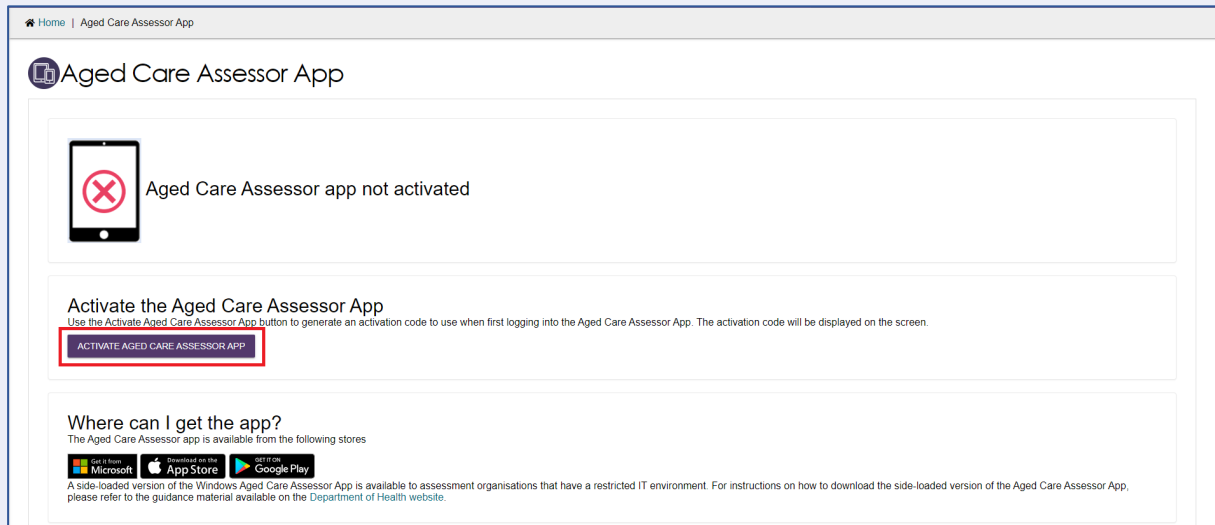
Once the App has been downloaded to your device, follow the steps below to activate the App.

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

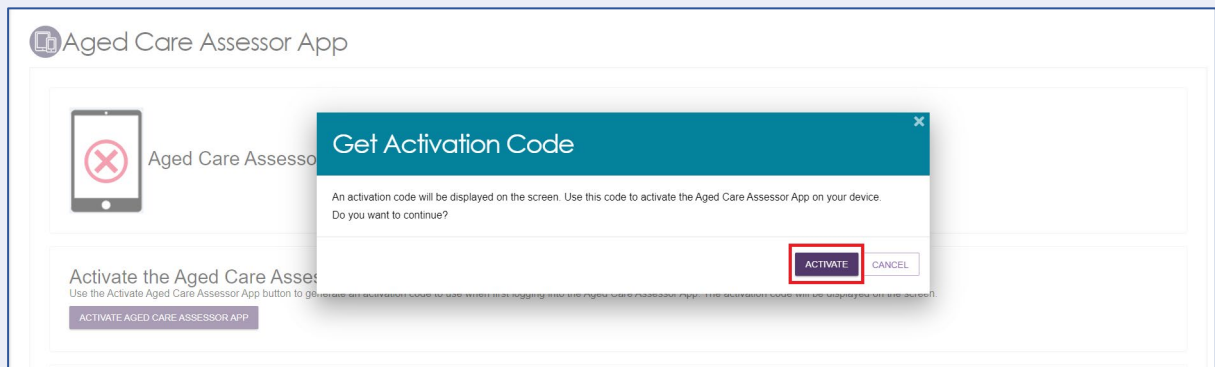


In this section, you will be able to view your App activation status, any referrals downloaded to your device, and generate a code to unlock, activate or reactivate your device.

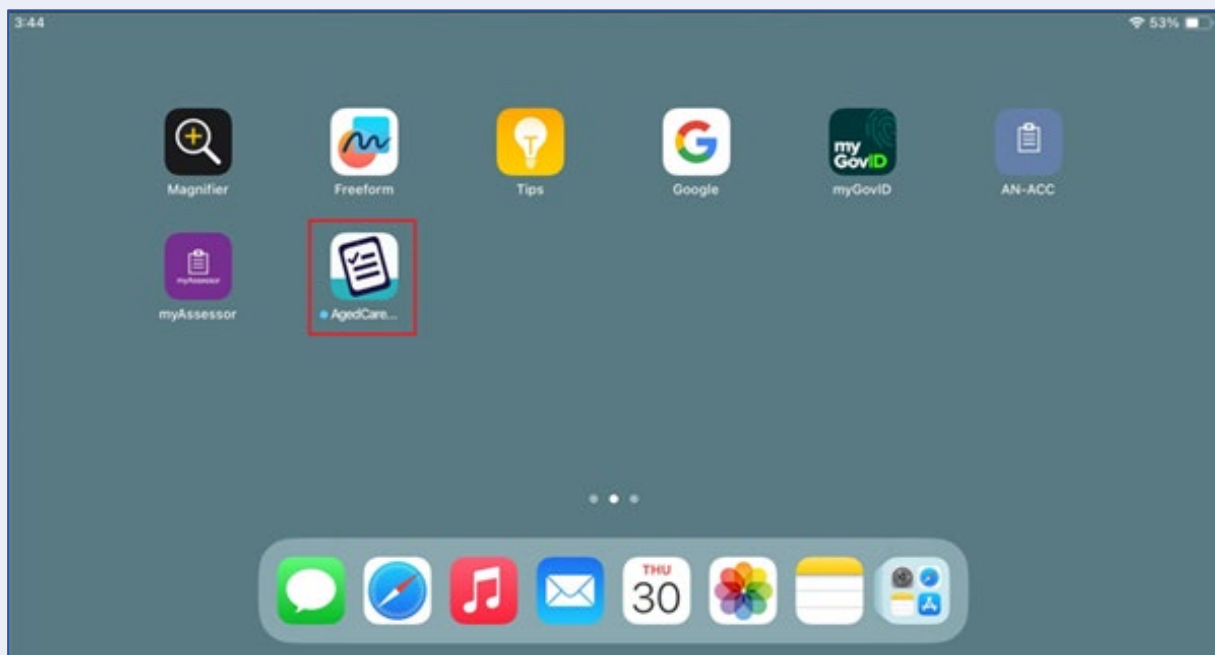
2. Select **Get Activation Code** to send an activation code to your registered email address.



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



4. Open the App from your device.



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

Please enter your registered assessor email address, and the 16 digit activation code.

Fields marked with an * are mandatory.

Email address *

Enter your email address

Activation code *

Find your activation code in the Assessor Portal

Activate application

Alternatively, scan QR code to verify

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

1800 836 799 Mon-Fri 8am - 9pm Sat 10am - 2pm Welcome Tisha

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

Home | Aged Care Assessor App

Aged Care Assessor App

Get Activation Code

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

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

ACTIVATE AGED CARE ASSESSOR APP

CLOSE

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

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

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

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

AGED CARE ASSESSOR APP TERMS OF USE

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

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

Cancel

Accept terms and continue

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

PRIVACY NOTICE FOR AGED CARE ASSESSOR APP

When this privacy notice applies

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

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

Information we collect

We collect the following personal information about you:

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

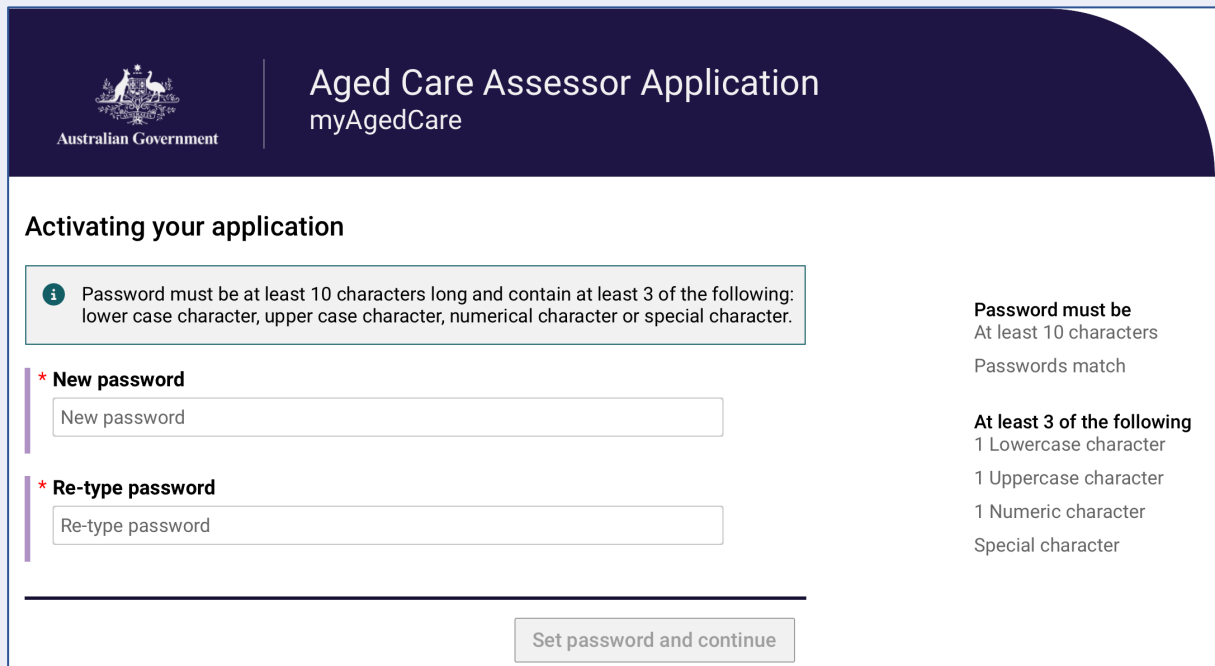
Why we collect this information

Cancel

Continue

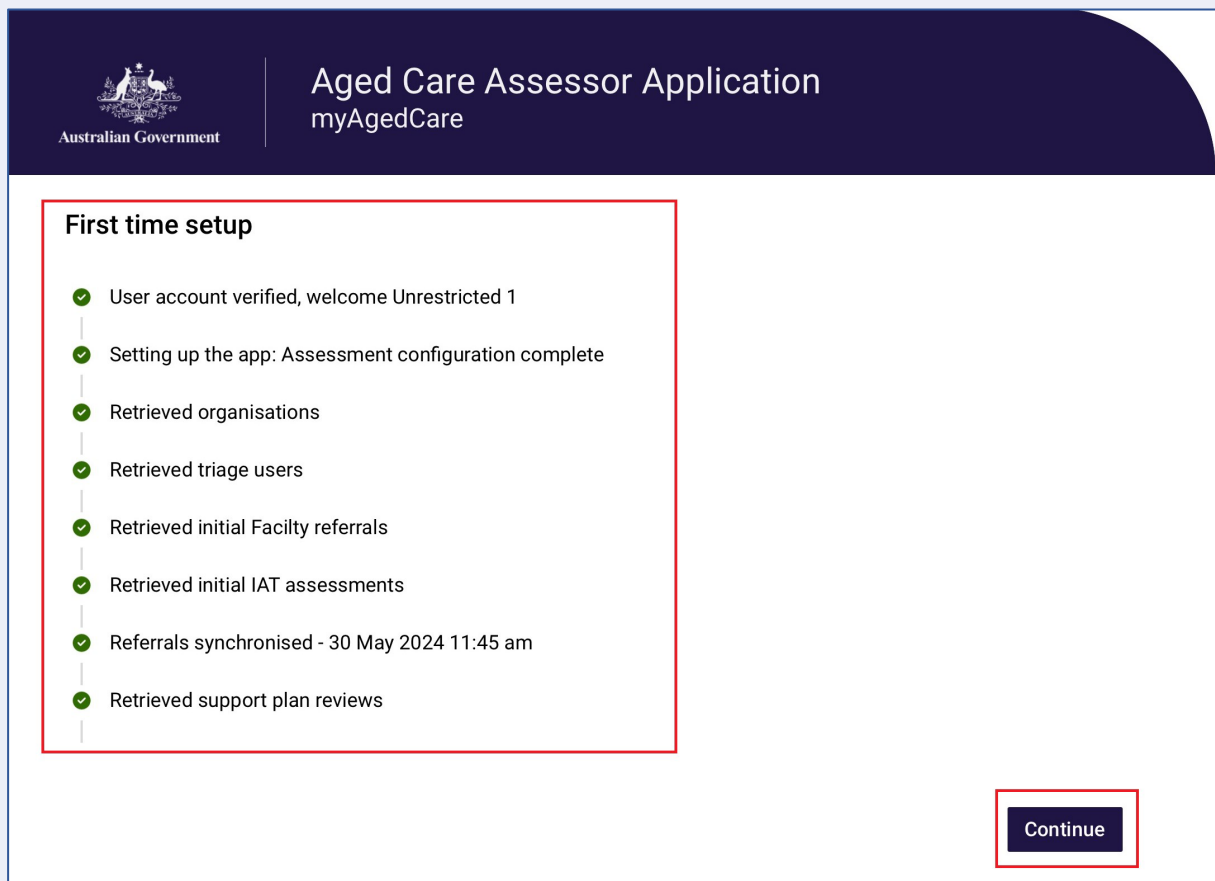
8. Once the App's Terms of Use has been accepted, you will be presented with the password screen. Create a password according to the rules displayed. You will be asked to enter the password a second time to ensure it is correct.

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



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

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

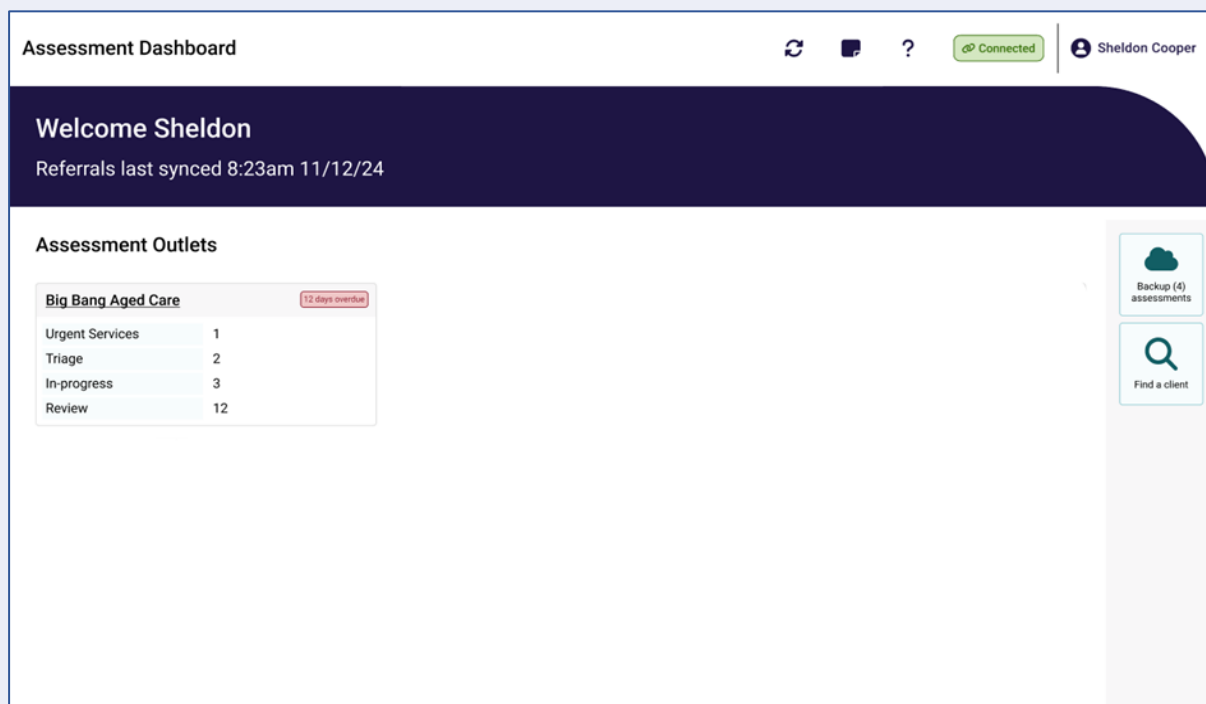


The screenshot shows the 'First time setup' screen. At the top left is the Australian Government logo. The title is 'Aged Care Assessor Application myAgedCare'. The main heading is 'First time setup'. A list of setup steps is shown, each with a green checkmark: 'User account verified, welcome Unrestricted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



10. You have now successfully completed the activation process. The next time you sign in to the App, follow the steps outlined below in the [Login to the App](#) section.

After successfully logging in, the home page (dashboard) will display.



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

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

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

3.3 Uninstalling the App

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

Android

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

iOS

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

Windows 10+

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

3.4 First time access following a reinstall of the App

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

3.5 Reactivating the App

The App can only be used on one device by one user at any one point in time, and access cannot be shared.

If the device needs to be assigned to another user, select the **Logout** button from the sign in screen in the app.

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

1. Log onto the Assessor Portal and go to the **Aged Care Assessor app** tile.
2. Select **RE-ACTIVATE AGED CARE ASSESSOR APP**. This will deactivate the App and send a new activation code to the user's registered email address.

Please note that this will remove all client and user data from the device.

Re-activating the Aged Care Assessor App

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

RE-ACTIVATE AGED CARE ASSESSOR APP

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

Get Activation Code

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

Do you want to continue?

RE-ACTIVATE AGED CARE ASSESSOR APP **CANCEL**

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

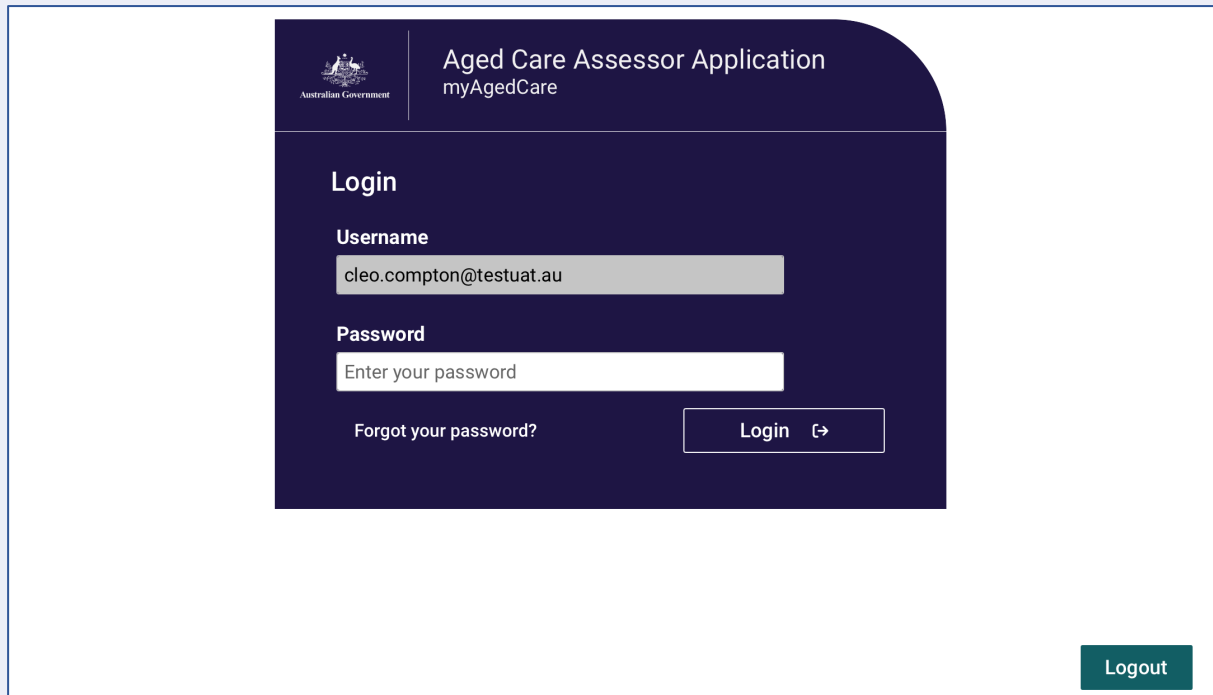
The new user can also get the Activation code by calling the My Aged Care service provider and assessor helpline (1800 836 799).

4. Launching and closing the App

4.1 Login to the App

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

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



Aged Care Assessor Application
myAgedCare

Login

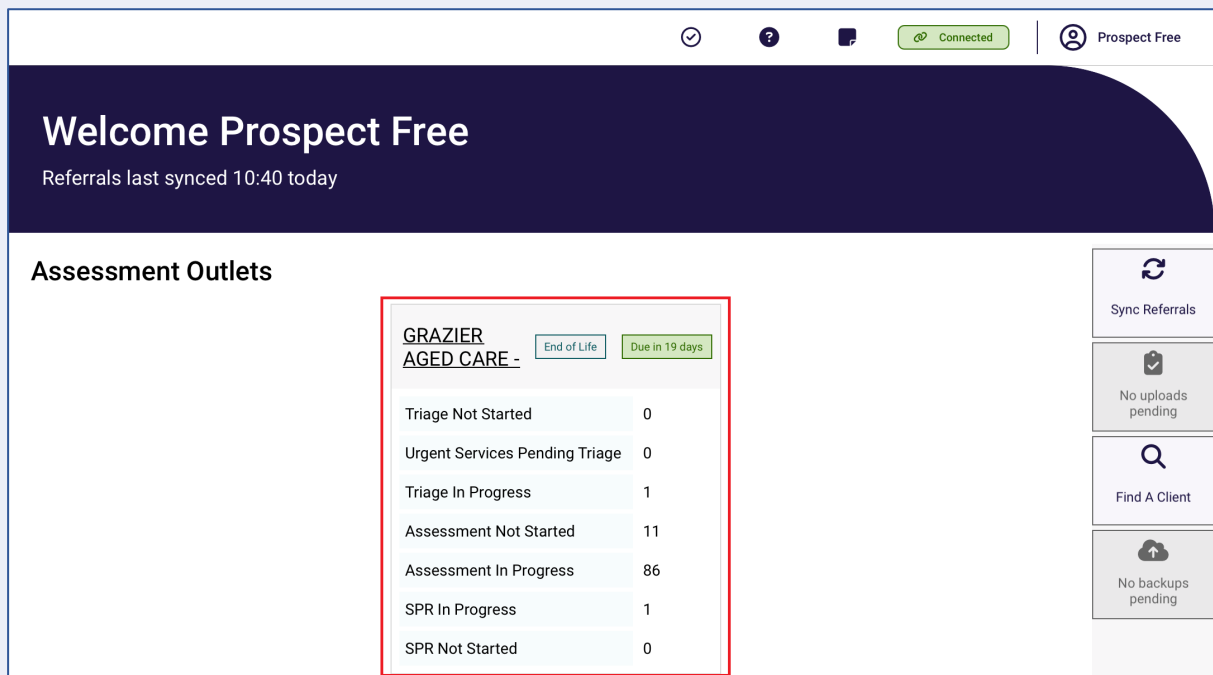
Username
cleo.compton@testuat.au

Password
Enter your password

[Forgot your password?](#)

2. The Dashboard displays, and you can view the list of outlets or facilities that you have been assigned to assess.

If you have any assessments assigned to you then you will also see these under the related outlet or facility.



Welcome Prospect Free
Referrals last synced 10:40 today

Assessment Outlets

GRAZIER AGED CARE -	
	End of Life Due in 19 days
Triage Not Started	0
Urgent Services Pending Triage	0
Triage In Progress	1
Assessment Not Started	11
Assessment In Progress	86
SPR In Progress	1
SPR Not Started	0

4.2 Inactivity time-out

The App will timeout if there is no activity for 5 minutes and you will be required to login to the app again.

Provided you have been working in an online mode, all data you have been working on will be auto-saved every 15 minutes.

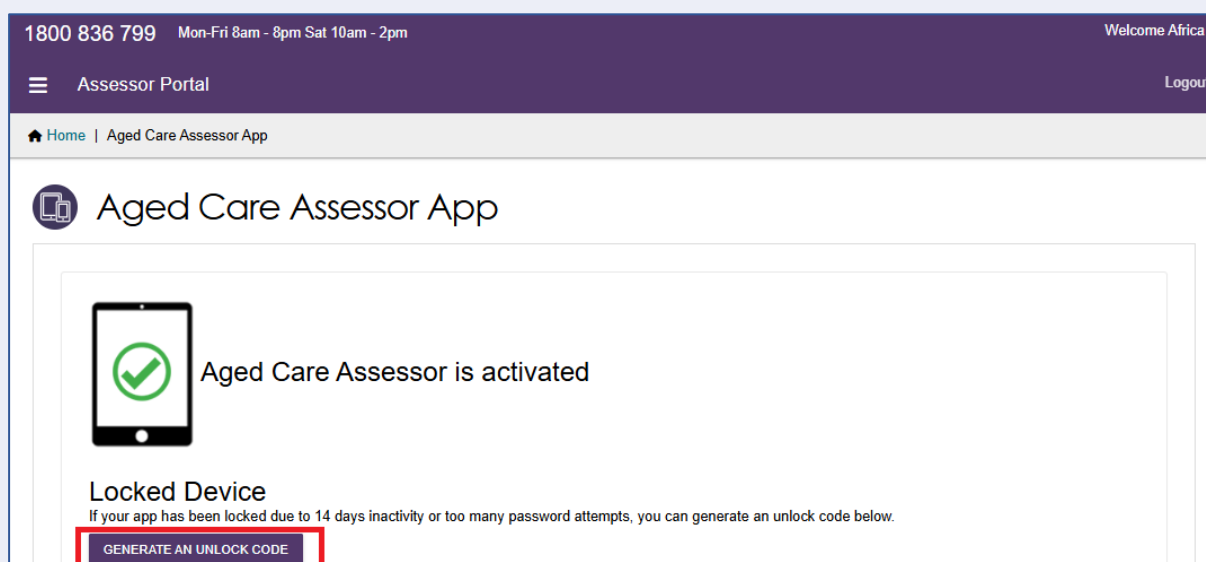
If you are working in offline mode and are logged out of the app due to inactivity, data you have entered will not be backed up to My Aged Care but will be available on the device still.

4.3 Generating an Unlock Code

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

You can regain access in the App section of the assessor portal.

To do so, select **Generate an Unlock Code**. Enter this code into your device and you will then be able to reset your password and log in.



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

4.4 Closing the App

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

4.5 Logging out of the App

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

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

UAT SAS ACAT
RAS Outlet 3 days overdue

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

Sync Referrals
No uploads pending
Find A Client
Backup 4 Assessments

2. Select the **Logout** button.

Dashboard Connected

Profile and settings

Assessor profile

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

Settings

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

Device information





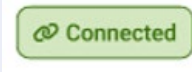
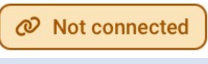
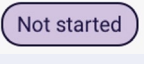
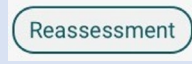
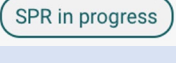
App version	31.0.0 (12)
Operating System (OS)	iOS - 17.5 (iOS - 17.5)

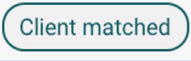
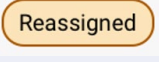

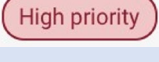
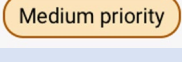
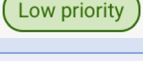







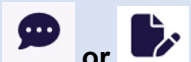




3. Confirm that you wish to logout.





Logout

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

5. App symbols

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

Symbol	Definition
	Client matched – indicates you have matched an offline client to an existing client once you have regained internet connection.
	Reassigned – indicates the assessment referral has been reassigned in the Assessor portal to another user.
   	Priority – depending on the client care needs, a priority for assessment is set.
	End-Of-Life – flags any IAT assessment or Support Plan Reviews that are on the End-of-life pathway.
	Aboriginal and Torres Islander Assessment Organisation – flags any client's IAT assessment or Support Plan Review that has a preference to be assessed or reviewed by such an Assessment Organisation.
	Hospital assessment - flags any IAT assessment of Support Plan Reviews that are assessed or reviewed in a hospital.
	Urgent Services – flags when the client's assessment referral includes any urgent service/s.
	Clear answers or page information – selecting Clear page information will clear any information entered on the current page of the assessment that the assessor is working on.
	Help - displays more detailed information about that page or tool.
	More information – in certain areas within the app, these icons will appear to provide further information on particular questions.
	Assessor comments or Quick notes is a feature, which allows notes to be recorded on the App. These notes could be sensitive in nature or may be notes that are for later reference during the assessment process.
	Double Chevrons – these will allow you to open the side panel.
	Requires action – indicates the section of the assessment is incomplete.
	Complete – indicates the section of the assessment is completed.
	Download assessment – indicates the assessment had not been downloaded to the device yet. When downloaded, this icon will disappear.

Symbol	Definition
	Upload assessment – this will upload the assessment to the My Aged Care Assessor Portal.
	Online Client - when an assessment has been matched online.
	Offline Client – when an assessment is created offline and is not matched.
Error uploading 	Error uploading – there has been an error during the uploading of the assessment referral.

Part B - IAT Assessments

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

6. Registering a client and self-referring for assessment

Needs assessors can register a new client within the App.

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

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

Following online client registration:

Needs assessors can [self-refer clients for assessment](#) if the reason for assessment is In-hospital, remote assessment, First Nations, Homeless or at risk of, or the client is considered vulnerable.

Referrals for reason outside of those listed above must be facilitated prior to linking to the registered client (refer to [Linking offline clients and assessments](#)).

! The following functionalities cannot be completed offline:

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

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

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

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

! These functions are available in the assessor portal, please refer to:

[My Aged Care – Assessor Portal User Guide 1 – Registering and referring clients for assessments.](#)

6.1 Finding a client

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

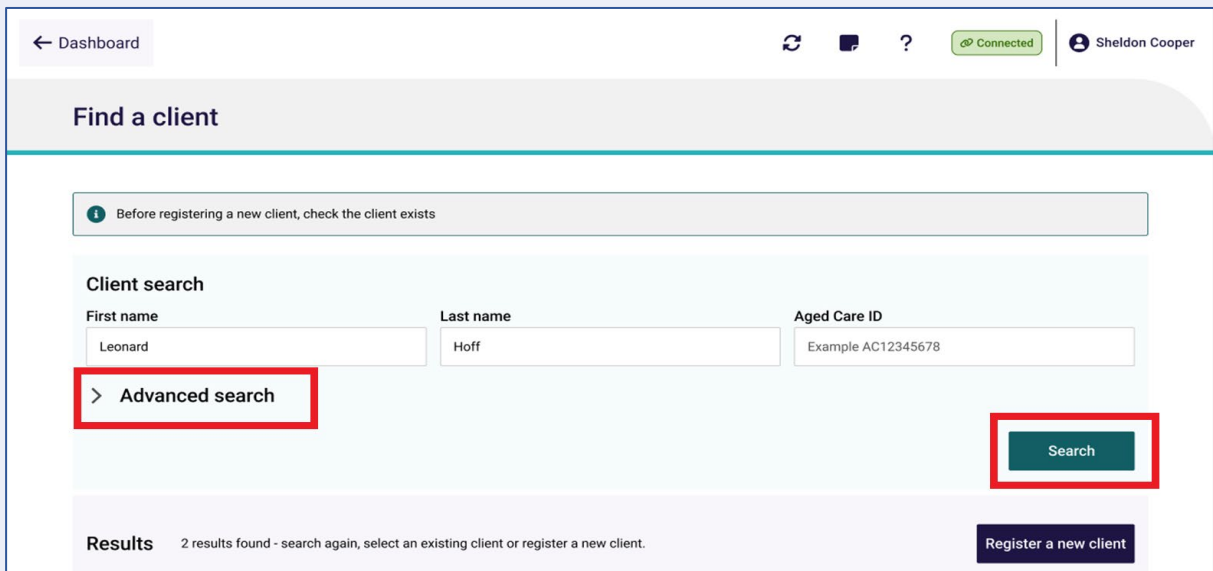
! If you are not connected to the internet, the **Find a client** function will not be available, and you can follow the steps in the **Creating an offline client** section to create a client via the **Create Offline Client** functionality.

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

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



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



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

Find a client

Before registering a new client, check the client exists

Client search

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

Advanced search

Preferred name: , Date of birth: dd/mm/yyyy, Status: Select a status

Suburb: , State: Select a state

Medicare card number: , Department of Veterans Affairs (DVA) number: , Centrelink Customer Reference number (CRN):

Aged Care Management Payment System (ACMPS) number: , System for the Payment of Aged Residential Care (SPARC) number:

Search

3. Any matching search results will display.

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

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

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

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

Find a client

Before registering a new client, check the client exists

First name: Cynthia, Last name: Banks, Aged Care ID: eg. 12345678

Advanced search

Search

No records returned Register a new client

6.2 Registering a client

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

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

Register a client

* Last name
Banks

* Gender

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

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

Date of Birth Estimated Age

* Date of birth

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

The following fields are mandatory or invalid:

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

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

Address

* Does the client have a home address?
Yes No

* Address lookup
Search for and select the address

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

Building name
Example, 8 Furzer Street

Unit type Unit number
Select a type

Floor type Floor number
Select a type

* Street number type * Street number
Select a type

* Street type Street type suffix
Select a type

* Street name

* Suburb or City

* State or Territory * Postcode * Country
Select a region



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

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

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

3:01PM Tue 17 Sep

< ? ⓘ Connected | Sammy Stark

Register a client

Identity Match

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

Does this person have a Medicare Card Number? *

Yes No

Medicare card number Individual reference number

* Please enter a valid Medicare number

Government IDs

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

Does this person have government IDs? *

Yes No

Aged Care Management Payment System (ACMPS) number

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

< ? ⓘ Connected | Prospect Free

Register a client

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

Does this person have government IDs? *

Yes No

Consent

Has the client consented to register?

Yes No

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

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

Tyra Banks's Details

- About
- Event Summary and Approvals
- Refer for Assessment

Personal Information
Born 1st January 1940

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

Communication requirements
No communication requirements provided

Identity documents (ID)

Medicare Card Number:
Department of Veterans' Affairs (DVA) Card Number:
Centrelink Customer Reference Number (CRN):
Aged Care Management Payment System (ACMPS) Number:
System for the Payment of Aged Residential Care (SPARC) Number:
Aged Care ID: AC14254684

Identity status
Not Attempted

Health Insurance
No health insurance provided

6.3 Potential Duplicates

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

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

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

← Find a client

Refresh, Home, Help, Connected, Sheldon Cooper

Register a client

! Potential duplicate clients have been identified. [Review duplicate clients](#)

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

← Leonard Hofsteader Refresh Help Connected Sheldon Cooper

Review potential duplicate client

Client details

→ Leonard Hoffsteader

→ Leo Hoffstead

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

Use new record
Use existing record

Cancel

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

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

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

6.4 Self-referring for assessment

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

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

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

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

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

The screenshot shows the 'Abe Smith's Details' page in the app. The user is logged in as 'Sammy Stark'. The page has a sidebar menu with options: 'About', 'Event Summary and Approvals', and 'Refer for Assessment'. The 'Refer for Assessment' option is highlighted with a red box. The main content area is titled 'Refer Abe Smith for Assessment' and contains the following fields: 'Select an outlet for referral' (with 'UAT SAS Outlet' selected), '* Select an assessment type:' (empty), and a 'Create Referral' button at the bottom right.

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

The screenshot shows the 'Abe Smith's Details' page in the app. The user is logged in as 'Sammy Stark'. The page has a sidebar menu with options: 'About', 'Event Summary and Approvals', and 'Refer for Assessment'. The 'Refer for Assessment' option is highlighted. The main content area is titled 'Refer Abe Smith for Assessment' and contains the following fields: 'A Comprehensive Assessment referral will be created for the client.', 'Select an outlet for referral' (with 'UAT SAS Outlet' selected), '* Select an assessment type:' (with 'Comprehensive Assessment' selected), '* Assessment Setting:' (empty), '* Priority:' (empty), and '* Reason for self referring:' (empty). There are information icons (i) next to the 'Assessment Setting' and 'Priority' fields. A 'Create Referral' button is highlighted with a red box at the bottom right.

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

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

The screenshot shows the 'Dashboard' page in the app. The user is logged in as 'Comp Assessor'. The page has a sidebar menu with options: 'About', 'Event Summary and Approvals', and 'Refer for Assessment'. The 'Refer for Assessment' option is highlighted. The main content area is titled 'Refer Barry Jones for Assessment' and contains the following fields: 'A Comprehensive Assessment referral will be created for the client.', a success message: 'Referral created successfully. Go back to home screen to download client.', and a 'Go Back' button highlighted with a red box.

7. Completing Triage (Self-Referral)

The IAT Triage is available in the Assessor App for Self-Referral assessments only. For other types of assessments, the triage is completed by the Triage Delegate in the Assessor Portal.

7.1 Starting Pre-Triage questions with consent for a client using the IAT

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

! Triage must be completed by a clinical staff member who holds the Triage Delegate role or completed under the supervision of a Triage Delegate.

For further information on the Triage Delegate role, visit [My Aged Care – Assessor Portal User Guide 12 – Managing delegate roles](#).

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

The screenshot shows the IAT Triage interface for a client named Abe Smith. At the top, there is a header with the client's name and a status bar indicating 'Connected' and the user 'Sheldon Cooper'. Below the header, there is a warning message: 'You are about to start a Triage for Abe Smith, AC94564648, born 18 November 1951, 72 Years. If the person's details are incorrect, a privacy breach may occur.' Below this, there is a note: 'Please be advised that without capturing the consent, you cannot proceed any further with the assessment.' There are three buttons: 'Start triage' (with a checkmark icon), 'Refer urgent services' (with a warning icon), and 'Remove from device' (with a trash can icon). The main section is titled 'Assessment consent' and contains several fields. A red box highlights the question: '* Would you like to pre-populate the Triage questions from previously collected information?' with two options: 'Yes' and 'Blank triage'. Other fields include '* Consent obtained from:' with radio buttons for 'The Client', 'The client with support person', 'The authorised representative', and 'Consent was not given'. There are also three expandable sections: 'About consent', 'Capacity to give consent', and 'Consent script'. At the bottom, there is a section for '* Select a record' with a radio button for 'Screening (Completed 12 APR 2022)'. A note at the top right of the form states 'Fields marked with an * are mandatory'.

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

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

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

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

Assessment Consent

All fields marked with an asterisk (*) are required

Consent obtained from?

The client The client with support person

Consent was not given The supporter guardian

Why was consent not provided?

Support person not available

Client unable to consent

Other, please specify

Assessment no longer required

Revoked by supporter

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

Confirm

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

Assessment Consent

All fields marked with an asterisk (*) are required

Supporter not available

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

Back **Continue**

* Comments

Comments here

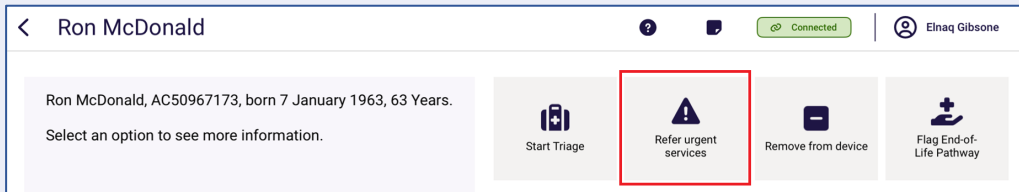
13 of 255

Confirm

7.2 Referring urgent services before completing Triage

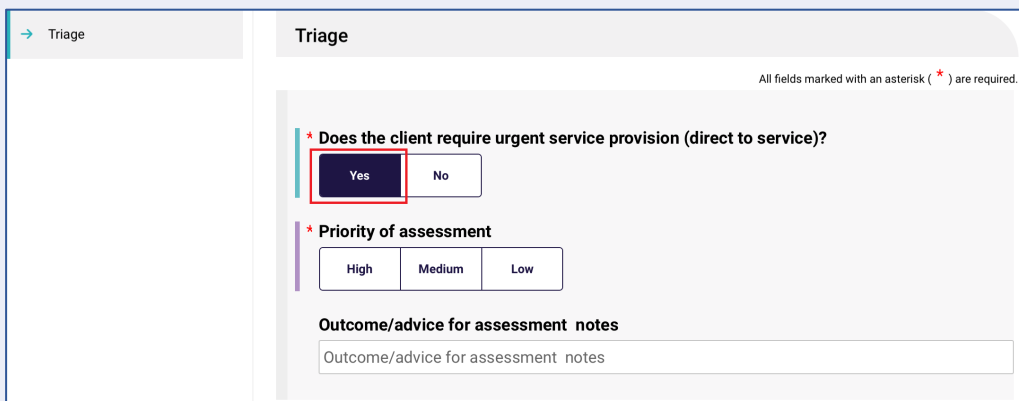
! Once the Triage Delegate has referred urgent services to the client (in the Assessor Portal), then the client must proceed to the IAT assessment either in the App or in the Portal, and the Self-Referral function is no longer available.

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



The screenshot shows the client profile for Ron McDonald. The 'Refer urgent services' button is highlighted with a red box. Other buttons include 'Start Triage', 'Remove from device', and 'Flag End-of-Life Pathway'.

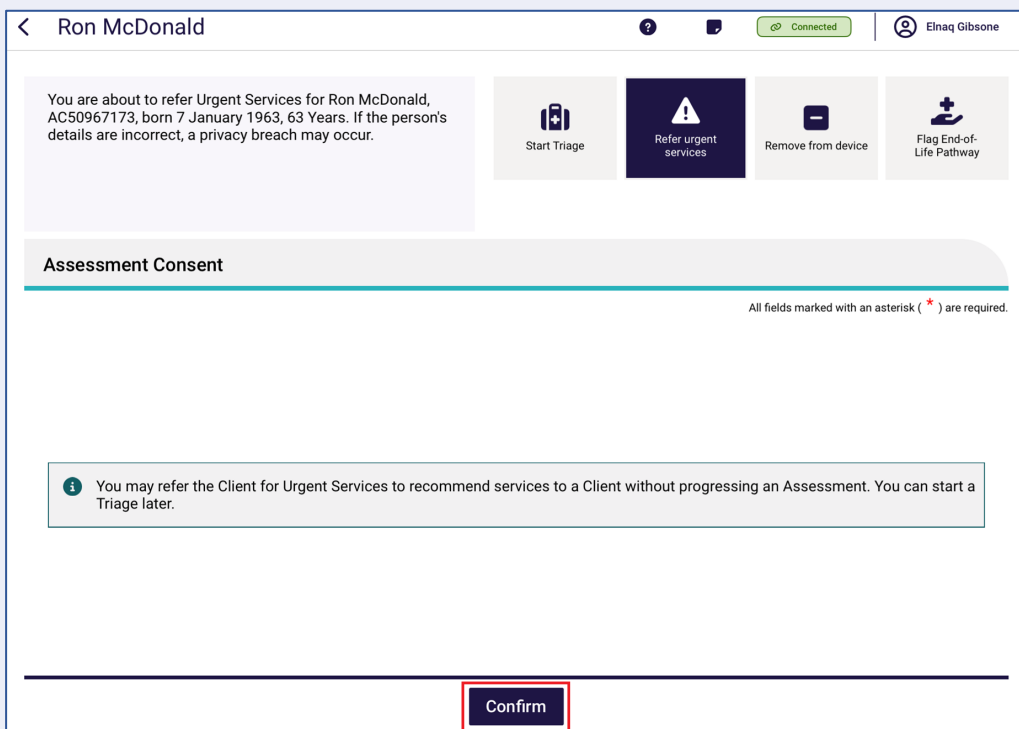
Alternatively, [once the triage has started](#), in the Triage page, Select **Yes** to **Does the client require urgent service provision (direct to service)?**



The screenshot shows the Triage page. The 'Yes' button for the question 'Does the client require urgent service provision (direct to service)?' is highlighted with a red box. Other options include 'No', 'High', 'Medium', and 'Low' for priority of assessment. A text box for 'Outcome/advice for assessment notes' is also visible.

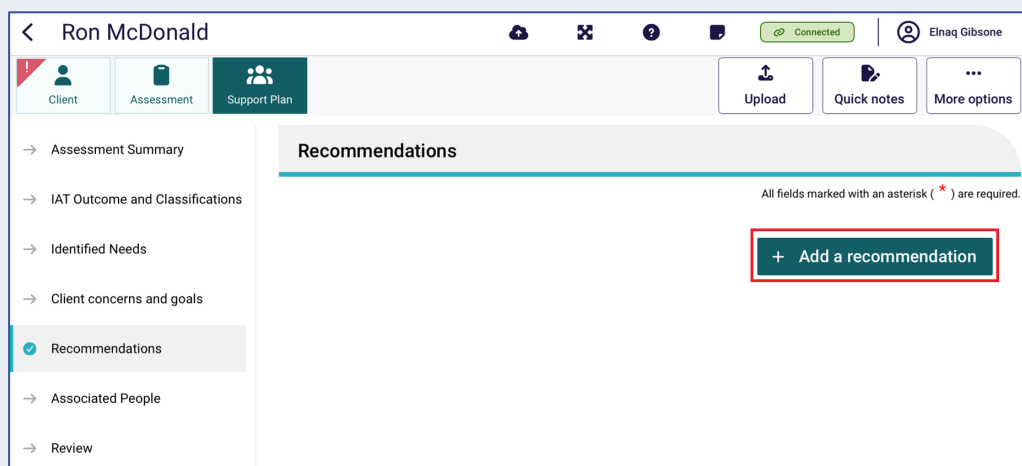
2. Once you have selected the **Refer urgent services** button, you will be asked to **Confirm** that you are wanting to proceed to refer the client for urgent services without progressing an assessment.

You can start and complete the triage questions later.



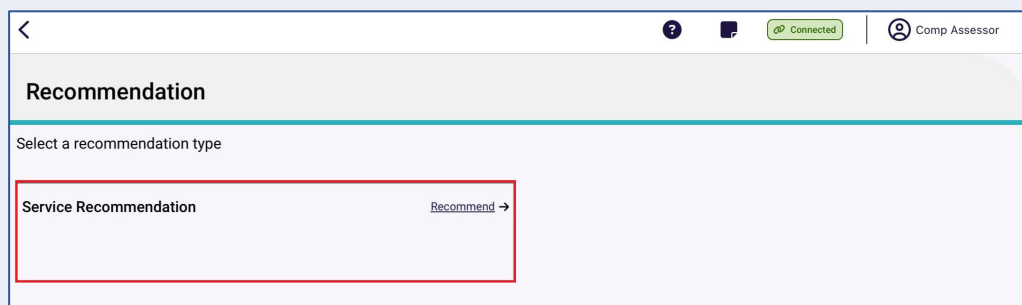
The screenshot shows the Confirmation page. The 'Confirm' button is highlighted with a red box. The page includes a warning message: 'You are about to refer Urgent Services for Ron McDonald, AC50967173, born 7 January 1963, 63 Years. If the person's details are incorrect, a privacy breach may occur.' and an 'Assessment Consent' section.

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



The screenshot shows a mobile application interface for a support plan. At the top, the name 'Ron McDonald' is displayed. Below the name are three tabs: 'Client', 'Assessment', and 'Support Plan'. To the right of these tabs are three buttons: 'Upload', 'Quick notes', and 'More options'. A sidebar on the left contains a list of menu items: 'Assessment Summary', 'IAT Outcome and Classifications', 'Identified Needs', 'Client concerns and goals', 'Recommendations' (which is selected and highlighted with a blue bar), 'Associated People', and 'Review'. The main content area is titled 'Recommendations' and contains a note: 'All fields marked with an asterisk (*) are required.' Below this note is a red-bordered button with a plus sign and the text '+ Add a recommendation'.

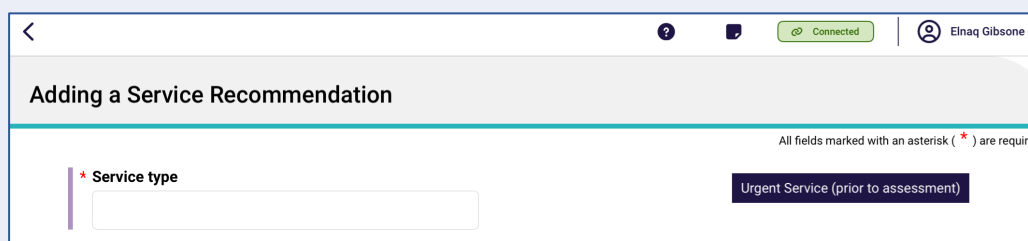
4. Select the hyperlink **Recommend** next to **Service Recommendation**.



The screenshot shows a mobile application interface for selecting a recommendation type. At the top, the name 'Comp Assessor' is displayed. Below the name are three buttons: 'Upload', 'Quick notes', and 'More options'. The main content area is titled 'Recommendation' and contains the text 'Select a recommendation type'. Below this text is a red-bordered box containing the text 'Service Recommendation' and a blue hyperlink 'Recommend' with a right-pointing arrow.

5. The Adding a Service Recommendation page displays. There is also a tag on the right hand side – **Urgent Service (prior to assessment)**.

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



The screenshot shows a mobile application interface for adding a service recommendation. At the top, the name 'Elnaq Gibsone' is displayed. Below the name are three buttons: 'Upload', 'Quick notes', and 'More options'. The main content area is titled 'Adding a Service Recommendation' and contains a note: 'All fields marked with an asterisk (*) are required.' Below this note is a red-bordered box containing the text '* Service type' and a text input field. To the right of the input field is a blue button with the text 'Urgent Service (prior to assessment)'.

Once a service type is selected, the services related to that service type is displayed.

For example, Nursing Care contains three services: Registered nurse clinical care, Enrolled nurse clinical care, and Nursing assistant clinical care.

Select one or more services required.

? Connected | Africa Green

Adding a Service Recommendation

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

*** Service type**

Nursing care

Services

Registered nurse clinical care
 Enrolled nurse clinical care

Nursing assistant clinical care

[Done](#)

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

- Complete all mandatory fields for the service recommendation marked by a red asterisk, including: Service type, Priority, Recommended start date, Recommended review date, and Recommended end date. For Urgent services for CHSP, MPSP and NATSIFACP, the recommended start date and end date are mandatory.

After completing all relevant fields, select **Save**.

? Connected | Comp Assessor

Adding a Service Recommendation

Fields marked with an * are mandatory

*** Service type**

Nursing



*** Priority**

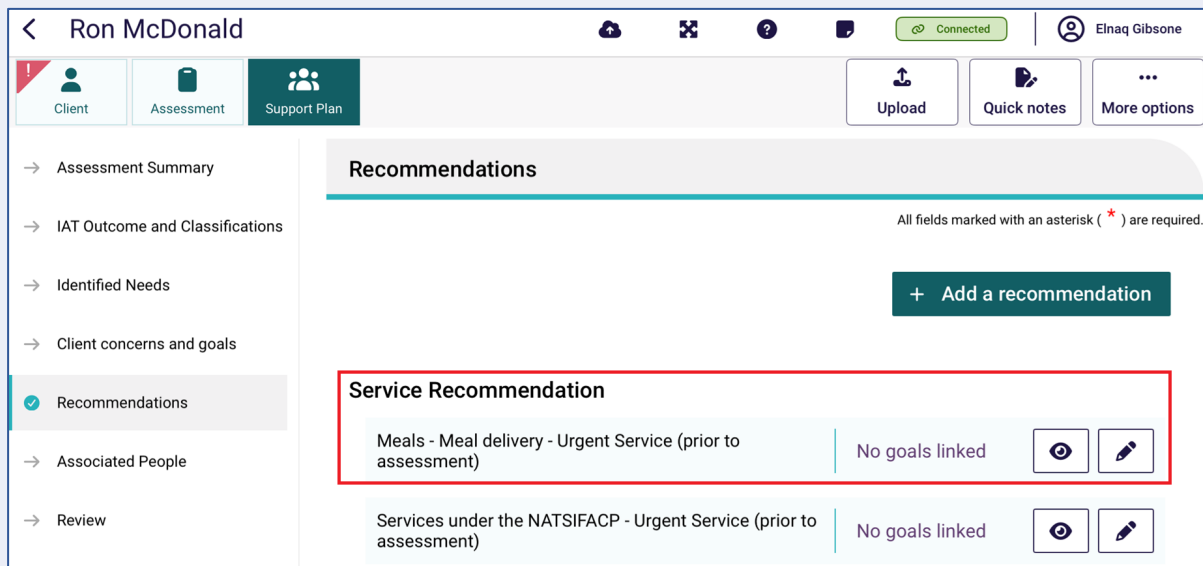
Recommended service intensity ⓘ

Recommended service frequency ⓘ

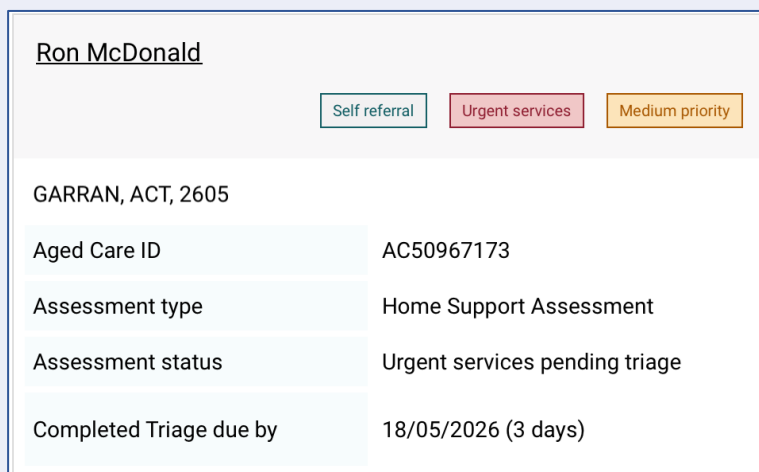
*** Recommend a start date**

- The urgent service displays in the Recommendations page. You can add another urgent service recommendation and they will all display on the same page.

You can also view the existing recommendations by selecting the Eye  icon, or edit by selecting the Pencil  icon, to the right of the recommendation name.



- The client's card now shows a **Urgent Services** tag, and the Assessment status updates to **Urgent services pending triage**.



Aged Care ID	AC50967173
Assessment type	Home Support Assessment
Assessment status	Urgent services pending triage
Completed Triage due by	18/05/2026 (3 days)

7.3 Starting Triage questions with client

- Select the **Assessment** tile at the top left of the screen. Complete the triage questions based on the information provided to you by the client.

There will be different mandatory questions under the following circumstances:

- Triage is being conducted in a hospital setting and the client is already receiving aged care services.
- Triage is for a client on the End-of-life pathway.

Lam Mary Connected Africa Green

Client **Assessment** Support Plan Complete Triage Upload Quick notes Clear page information More options

You are conducting a Self Referral Assessment

Triage Triage

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

Date of Triage ⓘ
19 May 2025

*** Registration screen information collected from**

<input type="checkbox"/> Client	<input type="checkbox"/> Client's carer, family member and/or other
<input type="checkbox"/> Client's representative/supporter	<input type="checkbox"/> Client's General Practitioner
<input type="checkbox"/> Representative of service provider	<input type="checkbox"/> Health professional
<input type="checkbox"/> Aboriginal Liaison Officer	<input type="checkbox"/> Aged care connector and co-ordinator
<input type="checkbox"/> Care finder	<input type="checkbox"/> Via interpreter
<input type="checkbox"/> Agent	<input type="checkbox"/> Other

2. At this stage you can also update the client's referral priority, if required.

You will then be required to add the reason for changing priority, and if **Other (please specify)** is chosen, a description of the reason.

Triage

All fields marked with an asterisk (*) are required

*** Priority of assessment**

High Medium Low

*** Reason for changing priority**

Changed circumstances
Incorrect priority assigned
Further functional decline
Entered emergency care
End-of-Life Pathway
Other (please specify)

*** Reason description**

Reason description

0 of 255

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

Then select **Complete Triage**.

The screenshot shows the 'Complete Triage' interface. At the top, the user 'Ana Smith' is logged in, and the client 'Elisha Burns' is identified. The main navigation bar includes 'Client', 'Assessment', 'Support Plan', 'Complete Triage' (highlighted with a red box), 'Upload', 'Quick notes', 'Clear page information', and 'More options'. Below the navigation bar, a banner indicates 'You are conducting a Self Referral Assessment'. The 'Triage' section contains a 'Priority of assessment' dropdown menu with options 'High', 'Medium', and 'Low'. Below this is a text input field for 'Outcome/advice for assessment notes'. At the bottom of the form, there is a field for 'Triage supervised by' which is highlighted with a red box.

7.4 Converting to comprehensive assessment

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

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

The screenshot shows the 'Convert to Comprehensive' interface. At the top, the user 'Africa Green' is logged in, and the client 'Thomas Tank' is identified. The main navigation bar includes 'Start Assessment', 'Refer urgent services', 'Convert to Comprehensive' (highlighted with a red box), 'Remove from device', and 'Flag End-of-Life Pathway'. Below the navigation bar, there is a text input field for 'Reason or comments' which is highlighted with a red box.

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

The screenshot shows the 'Convert to Comprehensive Assessment' interface. At the top, the user 'Africa Green' is logged in, and the client 'Thomas Tank' is identified. The main navigation bar includes 'Reason for change' (set to 'High level care needs') and 'Reason or comments' (highlighted with a red box). Below the navigation bar, there is a text input field for 'Reason or comments' which is highlighted with a red box. At the bottom of the form, there are 'Cancel' and 'Confirm' buttons, with 'Confirm' highlighted with a red box.

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

Thomas Tank

Self referral Low priority

BASSENDEAN, WA, 6054

Aged Care ID	AC04051199
Assessment type	Comprehensive Assessment
Assessment status	Assessment not started
No current milestone	

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

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

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

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

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

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

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

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

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

The screenshot shows the 'Assessor Portal' interface. At the top, there is a navigation bar with 'Assessor Portal' and a 'Logout' link. Below this is a breadcrumb trail: 'Home | Aged Care Assessment App'. The main heading is 'Aged Care Assessor App'. A central card displays a smartphone icon with a green checkmark and the text 'Aged Care Assessor is activated'. Below this, a 'Locked Device' section explains that the app is locked due to inactivity or too many password attempts and offers a 'GENERATE AN UNLOCK CODE' button. There are two tabs: 'Assessments' (selected) and 'Reviews'. The 'Downloaded Referrals' section provides instructions on removing referrals and lists three reasons for removal. A table shows three referrals with a 'Remove from Device?' column containing a trash icon.

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

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

If a downloaded referral is reassigned to another assessor, any data entered on the device whilst offline will not be able to be uploaded and will be discarded by the App.

To retain data entered offline, upload the assessment to the assessor portal prior to re-assigning the referral.

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

8.1 Navigating between referrals and reviews

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

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

To navigate between each view, use the side menu.

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

Welcome Sammy Stark
Referrals last synced 19:09 yesterday

Assessment Outlets

UAT SAS Outlet Due in 2 days

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

Sync Referrals
No uploads pending
Find A Client
Backup 3 Assessments

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

Dashboard

Filters 7 assessments, sorted by Client Last Name

Test Client Self referral Medium priority

Aged Care ID
Assessment type: Home Support Assessment
Assessment status: Triage not started
No current milestone

Aaron Jones Self referral Medium priority

CRONULLA, NSW, 2230
Aged Care ID: AC19537430
Assessment type: Home Support Assessment
Assessment status: Triage in progress
Completed Triage due by: 21/09/2024 (4 days overdue)

Ace Sharp Self referral Medium priority

KURRI KURRI, NSW, 2327
Aged Care ID: AC48348551
Assessment type: Comprehensive Assessment
Assessment status: In progress
Completed Support Plan: 20/09/2024 (5 days overdue)

Aadi Smith Self referral Medium priority

GLEN INNES, NSW, 2370
Aged Care ID: AC92092113
Assessment type: Home Support Assessment
Assessment status: Triage not started
Completed Triage due by: 21/09/2024 (4 days overdue)

Sync Referrals
New Assessment
Backup Assessments



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

- Keyword
- Order – the default order is Client Last Name
- Status
- Priority
- Assessment type.

← Dashboard Big Bang Aged Care (9 IAT Assessments) Connected Sheldon Cooper

Filter

Keyword

Q Name or ID

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

Clear filters

Client Name	Location	Assessment Type	Priority	Status	Clinical Intervention Due
Penny Teller	Bonner, ACT, 2914	Residential respite	High priority	Self-referral	18/9/2023 (14 days)
Leonard Hofstadter	Pasadena, NSW, 2157	Home support	High priority	Triage Completed	18/9/2023 (14 days)
Howard Wolowitz	Maryborough, QLD, 4567	Comprehensive	High priority	In progress	18/9/2023 (14 days)

4. To find assessments and order by different criteria, select the drop down, and then select your option from the list displayed.

For example:

- Select Order, then choose between Client last name, Client first name, Assessment type, Client locality, Assessment priority, (currently) in IAT review, KPI finishing first, or (clients who require) urgent services.
- Select Status, then choose between Triage not started, Urgent services pending triage, Triage in progress, Assessment not started, In progress, Assessment cancelled, Triage cancelled, SPR not started, SPR in progress, or Closed.
- Select Priority, then choose between Urgent, High, Medium, or Low.
- Select Assessment type, then choose between Residential respite, Comprehensive assessment, Home support assessment or Support plan review.

The drop down will also display how many assessments of each criteria that your current outlet has.

Dashboard UAT SAH Automation Outlet Connected Elnaq Gibsone

Keyword Clear filters

Keyword filter

Order Assessment P... **Status** it Not Started - **Priority** **Assessment type**

Filters **1 assessment, sorted by Assessment Priority, filtered by 'Assessment Not Started'** Filters applied

Elenore Turns Self referral High priority

Aged Care ID AC82486390

Done

Triage Not Started
Urgent Services Pending Triage - 1
Triage In Progress - 1
Assessment Not Started - 1
In Progress - 16
Assessment Cancelled
Triage Cancelled

5. The App will summarise your criteria in a sentence, and display all assessments that satisfy your criteria.

Dashboard UAT SAH Automation Outlet Connected Elnaq Gibsone

Keyword Clear filters

Keyword filter

Order Urgent Servic... **Status** **Priority** **Assessment type** Home Suppor...

Filters **4 assessments, sorted by Urgent Services, filtered by 'Home Support Assessment'** Filters applied

Ron McDonald Self referral Urgent services Medium priority

GARRAN, ACT, 2605

Aged Care ID AC50967173

Assessment type Home Support Assessment

Assessment status Urgent services pending triage

Completed Triage due by 18/05/2026 (due today)

Mario Client Self referral Medium priority

MUNDULLA, SA, 5270

Aged Care ID AC41837618

Assessment type Home Support Assessment

Assessment status In progress

Finalised Support Plan due by 25/05/2026 (7 days)

Maria Client Self referral High priority

Elenore Turns Self referral High priority

List view
Sync Referrals
New Assessment
Backup Assessments

8.2 Downloading a client's referral or review

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

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

The screenshot shows a dashboard with a header 'Dashboard' and a user profile 'Sammy Stark'. Below the header, there are filters for '7 assessments, sorted by Client Last Name'. The main content area displays four client cards:

- Test Client**: Self referral, Medium priority. Aged Care ID: [redacted]. Assessment type: Home Support Assessment. Assessment status: Triage not started. No current milestone.
- Aaron Jones**: Self referral, Medium priority. CRONULLA, NSW, 2230. Aged Care ID: AC19537430. Assessment type: Home Support Assessment. Assessment status: Triage in progress. Completed Triage due by: 21/09/2024 (4 days overdue).
- Ace Sharp**: Self referral, Medium priority. KURRI KURRI, NSW, 2327. Aged Care ID: AC48348551. Assessment type: **Comprehensive Assessment** (highlighted in red). Assessment status: In progress. Completed Support Plan: 20/09/2024 (5 days overdue).
- Aadi Smith**: Self referral, Medium priority. GLEN INNES, NSW, 2370. Aged Care ID: AC92092113. Assessment type: **Home Support Assessment** (highlighted in red). Assessment status: Triage not started. Completed Triage due by: 21/09/2024 (4 days overdue).

On the right side of the dashboard, there are three buttons: 'Sync Referrals', 'New Assessment', and 'Backup Assessments'.

3. To ensure that you are viewing the most up to date list of referrals/reviews assigned to you, select **Sync Referrals** on the righthand side of the page when you are connected to the internet.

If you cannot view the client's referral/review card on the Dashboard, ask your Team Leader to ensure it has been assigned to you, or refer to the [Troubleshooting and diagnostics](#) section.


The screenshot shows a dashboard with a header 'Dashboard' and a user profile 'Comp Assessor'. Below the header, there are filters for '16 assessments, sorted by Client Last Name'. The main content area displays six client cards:

- Harry Jones**: Urgent services pending triage, Medium priority. Aged Care ID: AC36272003. Assessment type: Comprehensive. No current milestone.
- Harry Miller**: Self referral, Triage in progress, Low priority. Aged Care ID: [redacted]. Assessment type: Comprehensive. Completed: Due in 5 days.
- Harry Nichols**: Self referral, Triage not started, Low priority. Aged Care ID: [redacted]. Assessment type: Comprehensive. First Clinical: Due in 14 days.
- Brook Resp**: SPR in progress. Aged Care ID: [redacted]. Assessment type: Support. Review Type: Ad-hoc.
- Club Respy**: SPR in progress. Aged Care ID: [redacted]. Assessment type: Support. Review Type: Ad-hoc.
- UATFred RTAGT...**: Assessment not started, High priority. Aged Care ID: [redacted]. Assessment type: Home Support. Completed: 15 days overdue.

On the right side of the dashboard, there are three buttons: 'Sync Referrals' (highlighted in red), 'New Assessment', and 'Backup Assessments'.

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

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

Eyad Christian 

Hospital Self referral Low priority

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

5. Once selected, the downloaded assessment will show the progress of downloading this to the device.

When all are downloaded, select **+ Open assessment**.

Download assessment for Aadi Smith

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

+ Open assessment Close

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

Download assessment for Aaron Jones

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

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

Try again

I'll do it later

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

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

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

Yes

Blank assessment

Confirm

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

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

Yes

Blank assessment

* Select a record

Comprehensive (Completed 06 June 2024)

Confirm



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

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

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

When the client's referral/review has successfully downloaded, the download icon will disappear, and when you select the client card you will have the option to **Start triage**, **Refer urgent services** to commence their assessment or review.

You will also be able to **Remove from device**, or **Flag End-Of-Life Pathway**.

You will now be able to:

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

8.3 Creating an offline client

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

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

This function is not available with support plan reviews.

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

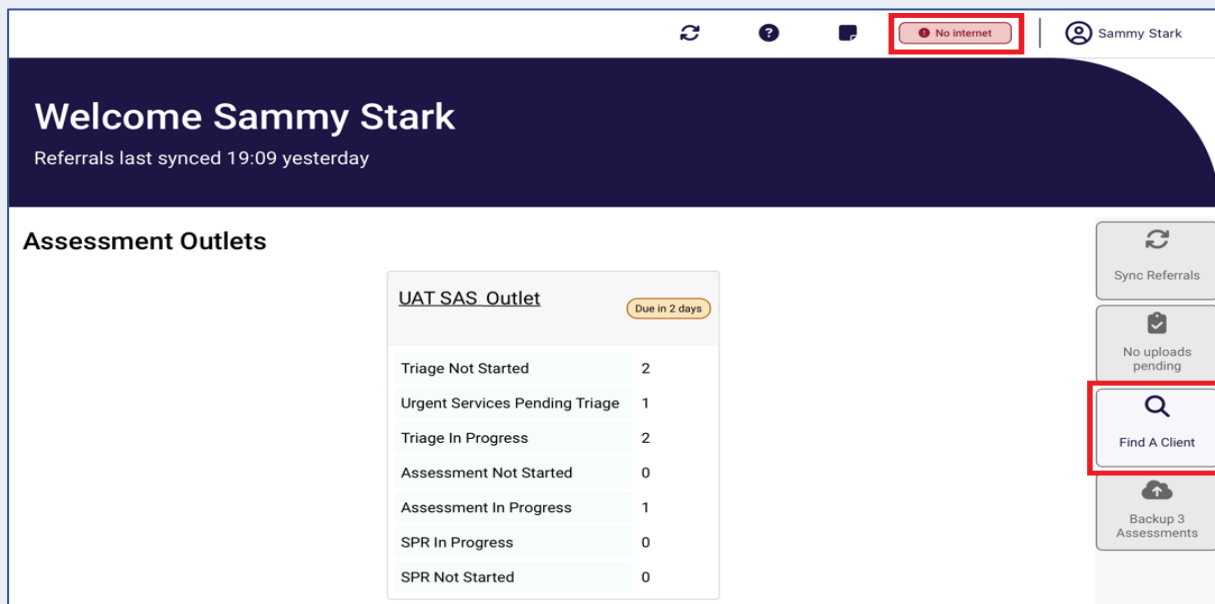
! Where possible, you should always attempt to confirm whether a person is registered with My Aged Care prior to creating an offline client in the App. If a client already has an assessment in progress, you will not be able to refer this client to your outlet and consequently be unable to upload and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

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

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

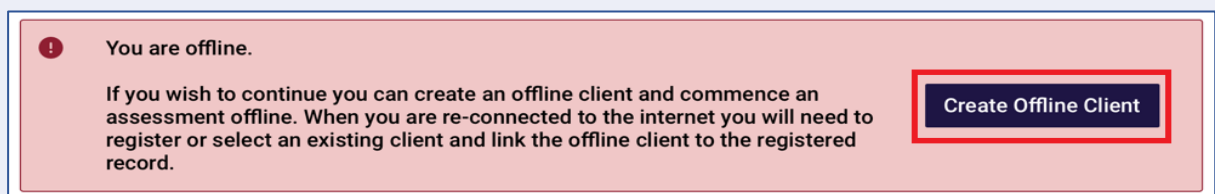
1. Open and [log in to the App](#) with your password. The Dashboard displays with your outlet and referrals. Note the Connectivity indicator on the top right of the screen is showing a red **No Internet** connection icon with a chain, which means the app is disconnected from the internet.

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

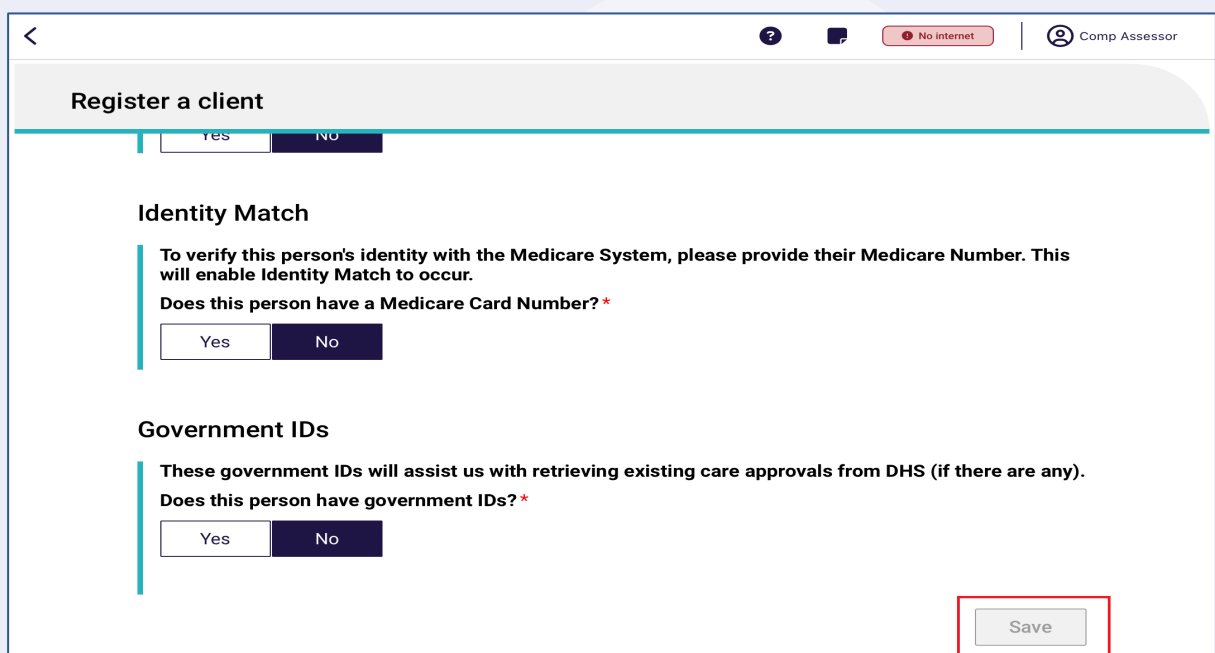


2. A message will display notifying you that you are not connected to the internet.

Select **Create Offline Client**.



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



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

Assessment details

Select an Assessment type and Outlet

Assessment type *

Comprehensive Assessment

Outlet *

UAT SAS trial Outlet

Save
Cancel

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

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

Filter

Keyword

🔍 Name or ID

Order
Last name A to Z

Status
Select a status

Priority
Select priority

Assessment type
Select a type

✕ Clear filters

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

Penny Teller

High priority Self-referral

Bonner, ACT, 2914

Aged Care ID AC12345678

Assessment type Residential respite

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

Leonard Hofstadter

High priority Triage Completed

Pasadena, NSW, 2157

Aged Care ID AC12345678

Assessment type Home support

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

Howard Wolowitz

High priority In progress Self-referral

Maryborough, QLD, 4567

Aged Care ID AC12345678

Assessment type Comprehensive

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

Raj Koothappali

Medium priority Closed Pending closure

Pasadena, NSW, 2157

Aged Care ID AC12345678

Assessment type Home support

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

Amy Farrah Fowler

Medium priority In progress

Maryborough, QLD, 4567

Aged Care ID AC12345678

Assessment type Comprehensive

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

Penny Teller

Urgent

Bonner, ACT, 2914

Aged Care ID AC12345678

Assessment type Support Plan Review

Review Type Ad-hoc


☁ Backup assessments

🔍 Find a client

For further information, go to My Aged Care | www.myagedcare.gov.au | 1800 836 799

44

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

Test Client 

Self referral Medium priority

Aged Care ID

Assessment type Home Support Assessment

Assessment status Triage not started

No current milestone

9. Viewing and adding client information


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

To view client information:

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

Dashboard Connected Sammy Stark

Filters 7 assessments, sorted by Client Last Name

Test Client 


Self referral Medium priority

Aged Care ID

Assessment type Home Support Assessment

Assessment status Triage not started

No current milestone

Aaron Jones 

Self referral Medium priority


CRONULLA, NSW, 2230

Aged Care ID AC19537430

Assessment type Home Support Assessment

Assessment status Triage in progress

Completed Triage due by 21/09/2024 (4 days overdue)

Ace Sharp 

Self referral Medium priority


KURRI KURRI, NSW, 2327

Aged Care ID AC48348551

Assessment type Comprehensive Assessment

Assessment status In progress

Completed Support Plan 20/09/2024 (5 days overdue)

Aadi Smith 

Self referral Medium priority

GLEN INNES, NSW, 2370

Aged Care ID AC92092113

Assessment type Home Support Assessment

Assessment status Triage not started

Completed Triage due by 21/09/2024 (4 days overdue)

Sync Referrals

New Assessment

Backup Assessments

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

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

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

! The client information is the same when in a downloaded support plan review.

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

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

! Any information that is updated from the App will overwrite the profile information that is in the client record when uploaded to the assessor portal.

← Leonard Hofstader

Client Assessment Support plan

Client profile

Contact details

Support network and coinhabitants

Wallet check

Event summary and approvals

Attachments

Notes

Client profile

Title
Mr

* First name

* Middle name

* Last name

Date of birth Estimated age

* Date of birth

! When all mandatory client profile information has been completed, a tick will appear next to the section.

This information must be completed to generate assessment outcomes at the completion of the assessment.

Client Assessment Support Plan

Client Profile

Contact Details

9.1 Contact Details

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

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

← Leonard Hofstede

Client Assessment Support plan

Sync data Notes More options

Contact details

Home phone number:

Consent to send SMS and emails about the client?

Yes No

Mobile phone number:

Australia +61 04134543234 **Verify**

*Unverified

Email:

testemail@hotmail.com

Notify by email:

Notify by SMS:

Other contact details

No contact details provided

Assessment information

Home address: 123 Northbourne Ave, Braddon, ACT 2900

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

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

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

← Harry Goff

Client Assessment Support Plan

Upload More options

Contact Details

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

Enter verification code

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

Home phone number

Consent to send SMS and emails about the client

Yes No

Mobile phone number

Australia +61 **Verify**

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

← Leonard Hofstader

Client Assessment Support plan

Sync data Notes More options

Contact details

Home phone number:

Consent to send SMS and emails about the client?

Yes No

Mobile phone number:

Australia +61 04134543234 Verify

Email: testemail@hotmail.com

Notify by email:

Notify by SMS:

Other contact details

No contact details provided

9.2 Support Network and Cohabitants

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

← Stella Stacey

Client Assessment Support Plan

Upload Quick notes More options

Support Network and Cohabitants

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

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

Supporters

> Mary Lamb - Supporter Guardian Remove

Supporter Organisations

No relationships found

Agent Organisations

> MONASH HEALTH - Agent (Care finder) Remove

People that Stella Stacey supports

No relationships found

Other Relationships

No relationships found

9.3 Wallet Check

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

Test Client

Client Assessment Support Plan Complete Triage Quick notes More options

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

Wallet check

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

My client has identification
 My client has no valid ID at this time
 My client is unable to produce ID

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

Common types of identification

Medicare Card
DVA Card
Drivers License
Health Care Card
Passport

9.4 Event Summary and Approvals

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

Example page with Comprehensive Assessment information

Client Assessment Support Plan Finalise Clinical supervisor Upload

Event Summary and Approvals

Assessment information

Comprehensive Assessment was completed on 5 October 2023

Client acknowledgement received on 5 October 2023

Comprehensive Assessment status is Support Plan Review

Current care approvals

Domestic Assistance
Approval start date 6 April 2024
Urgent Service (prior to assessment)

Existing Classification

SaH Classification 3
High priority

Event Summary and Approvals

Assessment information

Home Support Assessment was completed on 5 October 2023

Home Support Assessment status is Support Plan Review

Recommended assessments

Home Support Assessment (Low priority) started 24 May 2020

Triage History

Triage Completed on 29 July 3 PM by James Jones.

Outcome : Eligible for home support assessment

Other recommendations

CHSP

Domestic assistance

Urgent (Prior to Assessment)

Meals

Current care approvals

CHSP

Domestic assistance

Approval start date 6 April 2024

Approval end date 6 June 2024

Meals

Approval start date 6 April 2024

Existing Classification

CHSP

Medium priority

! Transitioned Home Care Package Levels

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

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

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

Winifred Witt's Details

- About
- Event Summary and Approvals
- Refer for Assessment

Existing Classification

Transitioned Home Care Pathway <small>Transitioned HCP Level 4</small>	Ongoing	Standard priority
---	---------	-------------------

On this page, for Support at Home services, assessors can view **all active existing classifications**, including multiple active classifications within the same category (e.g., multiple Assistive technology or Home modifications entries).

They can view the priority level for each classification and service. They can also view approval start and end dates.

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

Client

History

Support Plan

Upload

Quick notes

More options

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

Event summary and Approvals

All fields marked with an asterisk (*) are required

Self-care products	Low priority
Managing body functions	Low priority

Existing Classification

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

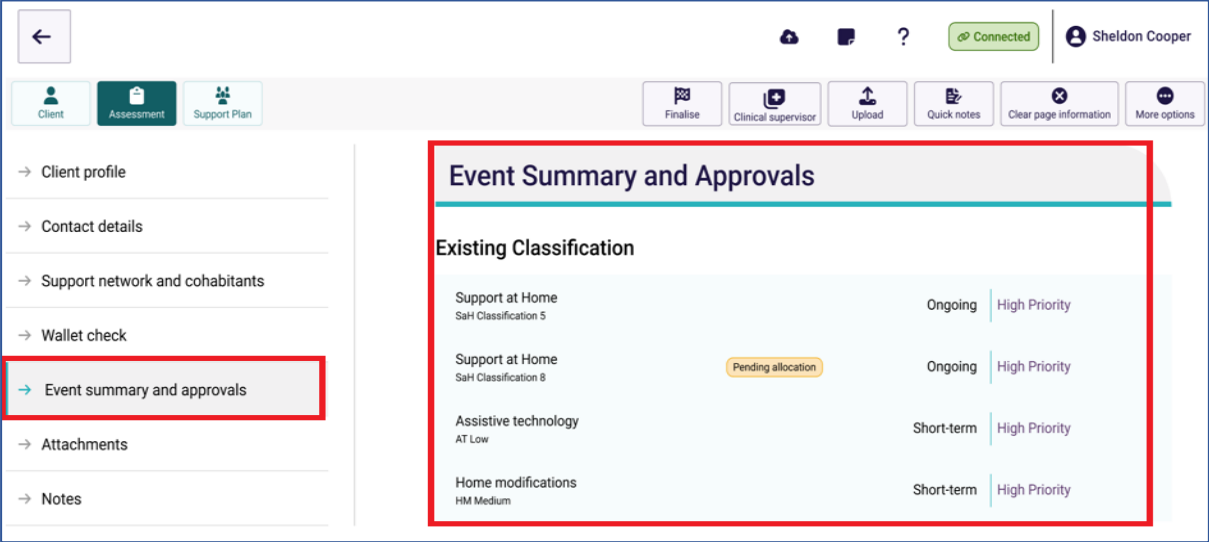
Current care approvals

Assistive technology

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

Assessors can view a client’s Assistive technology (AT) and Home modifications (HM) classification and priority category details after an assessment has been completed and approved.

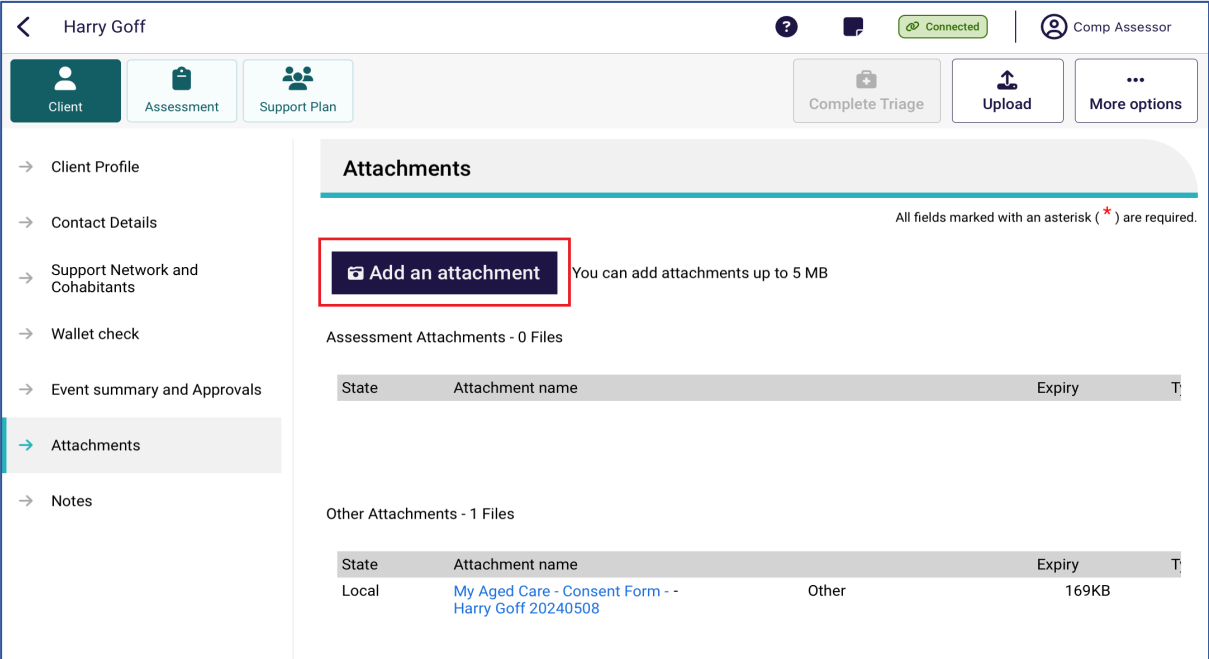
If the client has been recommended for AT or HM services, their classification and associated priority category will be displayed under the Existing Classification section, supporting informed decision-making for Support at Home aged care services.



9.5 Attachments

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

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



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

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

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

Other attachment types available include:

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

Select **Done** after choosing the attachment type. Once you have recorded the details, you can select **Capture photo**, which will open your device's camera app.

An Non-approval letter attachment type example is shown below.

The screenshot shows a mobile application interface for adding an attachment. The form is titled "Add attachment" and contains the following fields and elements:

- Name:** A text input field with a character count of "0 of 146".
- Type:** A dropdown menu with "Non-Approval Letter to Client" selected. This field is highlighted with a red box.
- Description:** A large text area for entering details.
- Buttons:** A "Capture photo" button (with a camera icon) and a "Done" button are located at the bottom right of the form area.
- Attachment List:** A list of attachment types is shown at the bottom of the screen, including "Legal documentation", "Letter by Medical Pract.", "Medication Summary", "Non-Approval Letter to Client" (highlighted with a red box), "Occupational Therapy Plan", "Offline Approval Form", and "Offline Notes".

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

! When uploading an attachment, it is crucial to ensure that the document is intended for the correct client.

Uploading an attachment to the wrong client's file can lead to a breach of privacy.

Always double-check the client details before proceeding with the upload.

If you are uncertain about the client's identity, please refrain from uploading the document and seek clarification.

This precautionary measure helps maintain the integrity of our service and protects client privacy.

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

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

The screenshot shows the 'Attachments' page for a client named Flynn Errol. The page is divided into three sections: 'Assessment Attachments - 1 Files', 'Other Attachments - 0 Files', and 'Correspondence Attachments - 0 Files'. Each section has a table with columns for State, Attachment name, Expiry, and Type. The 'Assessment Attachments' section contains one entry: 'Errol Flynn non approval letter' (Local, Non-Approval Letter to Client). A red box highlights the 'Assessment Attachments' section.

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

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

You will need to enter a **Name** and a **Type** of image (for example, Power of Attorney), which will be displayed in the My Aged Care assessor portal.

You can also add a description for the attachment in a free text box.

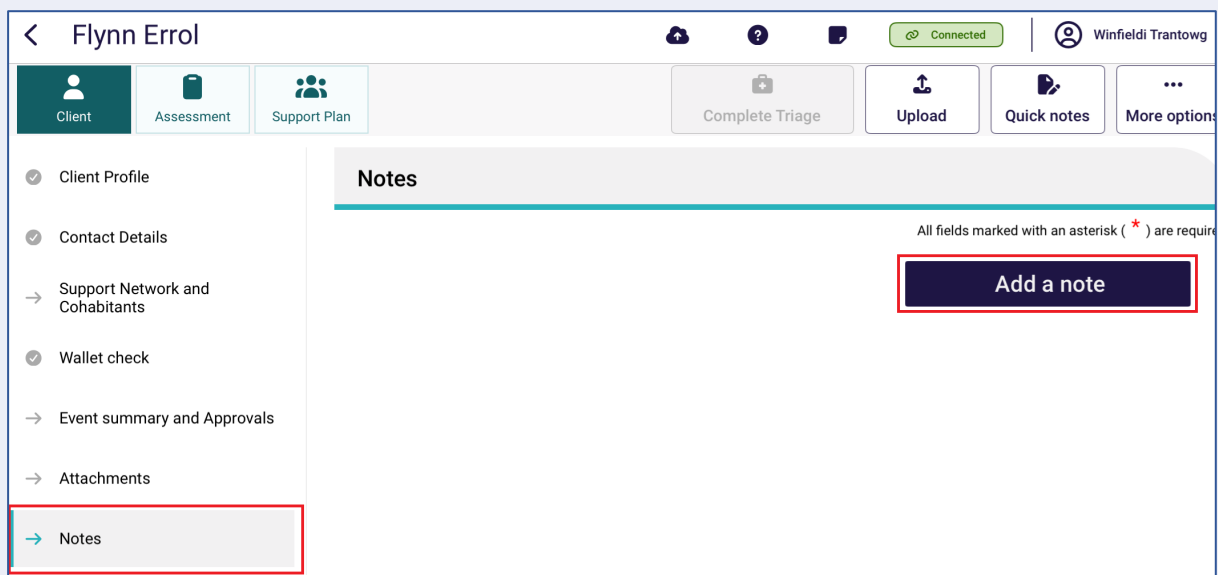
9.6 Notes

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

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

To add a Note:

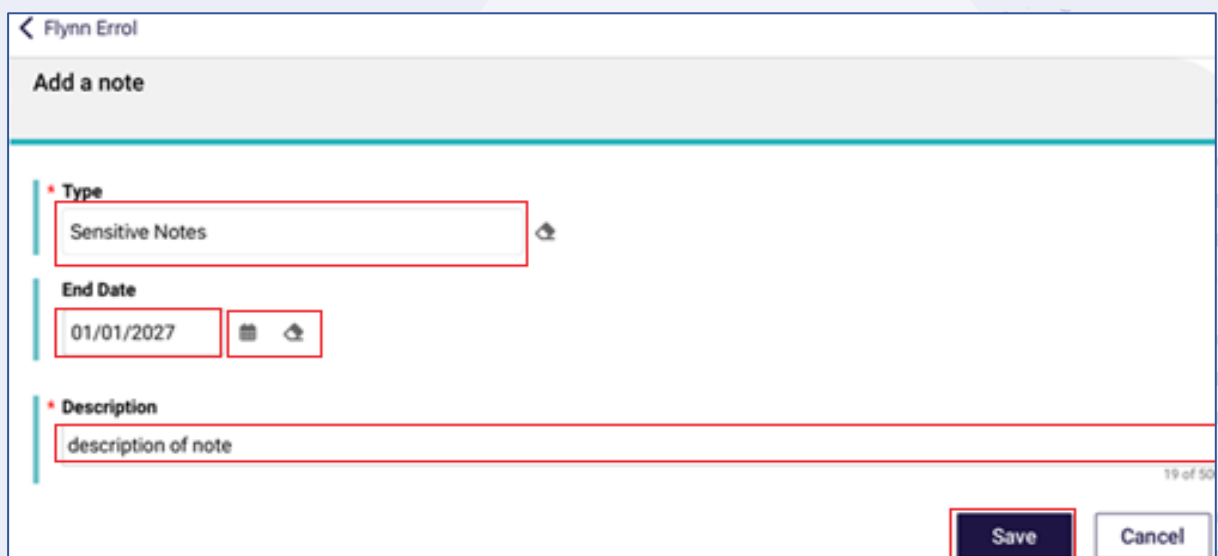
1. Select **Notes** from the client record, and select **Add A Note**.



The screenshot shows the client record for Flynn Errol. The 'Notes' section is highlighted in the left-hand navigation menu. A red box highlights the 'Add a note' button in the main content area. The top navigation bar includes 'Client', 'Assessment', and 'Support Plan' tabs, along with 'Complete Triage', 'Upload', 'Quick notes', and 'More options' buttons. The user's name 'Winfieldi Trantowg' is visible in the top right corner.

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

Add an **end date** for the note if applicable. Once added you are able to edit or delete it using the **Calendar** or the **Eraser** icons. Enter a description for the note. Finally, select **Save**.



The screenshot shows the 'Add a note' form for Flynn Errol. The form has three main sections: 'Type', 'End Date', and 'Description'. The 'Type' dropdown menu is set to 'Sensitive Notes'. The 'End Date' field is set to '01/01/2027' and includes calendar and eraser icons. The 'Description' field contains the text 'description of note'. A red box highlights the 'Save' button at the bottom right of the form. The text '19 of 50' is visible in the bottom right corner of the form area.

3. Clients (and their support network) will only be able to view Client story and other notes.

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

The screenshot shows the 'Notes' page for a client named Flynn Errol. The page has a top navigation bar with 'Client', 'Assessment', and 'Support Plan' tabs. Below this is a 'Notes' section with a table of notes. The table has three columns: 'Sensitive Notes', 'Gender Identity/Sexual Pref', and 'Preference'. The first row has 'description of note' under 'Sensitive Notes'. The second row has 'Gender information' under 'Gender Identity/Sexual Pref'. The third row has 'Flynn likes face to face meetings' under 'Preference'. There is an 'Add a note' button at the top right of the notes section. A note at the top right of the notes section says 'All fields marked with an asterisk (*) are required'.

10. Registering a support person

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

You can:

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

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

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

10.1 Creating a relationship for an individual supporter or supporter lite

You must be connected to the Internet.

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

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

Client Profile

Contact Details

Support Networks and Cohabitants

Wallet check

Event summary and Approvals

Attachments

Notes

Support Network and Cohabitants

All fields marked with an asterisk (*) are required

Refresh relationships Last updated 11:18 am 26/09/2025 Create Relationship

Supporters
No relationships found

Supporter Organisations
No relationships found

Agent Organisations
No relationships found

- In the **Create Relationship** page, choose a relationship to establish for the client. In this case it would be **Supporter**. Depending on the relationship chosen, the following steps may vary.

Mary Contrary

Mary Contrary

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

Create Relationship

* The support relationship Mary would like to establish is:

Supporter

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

Next

Done

Supporter

Supporter Guardian

Agent

Carer

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

< Mary Contrary

Mary Contrary

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

Create Relationship

* The support relationship Mary would like to establish is:

Supporter

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

Next

Done

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

Organisation: Staff at a support organisation (e.g. an advocacy organisation)

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

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

< Mary Contrary

Mary Contrary

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

Create Relationship

* The support relationship Mary would like to establish is:

Supporter

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

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

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

Yes No

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

Yes No

Next

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

Mary Conrardy

Mary Conrardy

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

Create Relationship

* The support relationship Mary would like to establish is:

Supporter

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

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

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

Yes No

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

Yes No

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

Next

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

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

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

Find a support person

Before registering a new client, check the client exists

First name Last name Aged Care ID

AC- eg. 12345678

Advanced search

Search

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

Find a support person

Before registering a new client, check the client exists

First name: Ronald (6 of 50)

Last name: Weasley (7 of 50)

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

Advanced search

Search

No records returned

Create Supporter Relationship

There are five pages in the **Register a Supporter** section: **Personal Details**, **Address Details**, **Identity Match**, **Attachments**, and **Details and Consent**.

Enter all mandatory fields in each of the five pages until the Register button turns blue. Then, select **Register**.

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

Back

Register a Supporter

All fields marked with an asterisk (*) are required

Personal details (checked)

Address details

Identity Match

Attachments

Details and Consent

Title

* First name: Ronald (6 of 50)

Middle name: (0 of 50)

* Last name: Weasley (7 of 50)

* Gender: Male

Date of birth / estimated age*

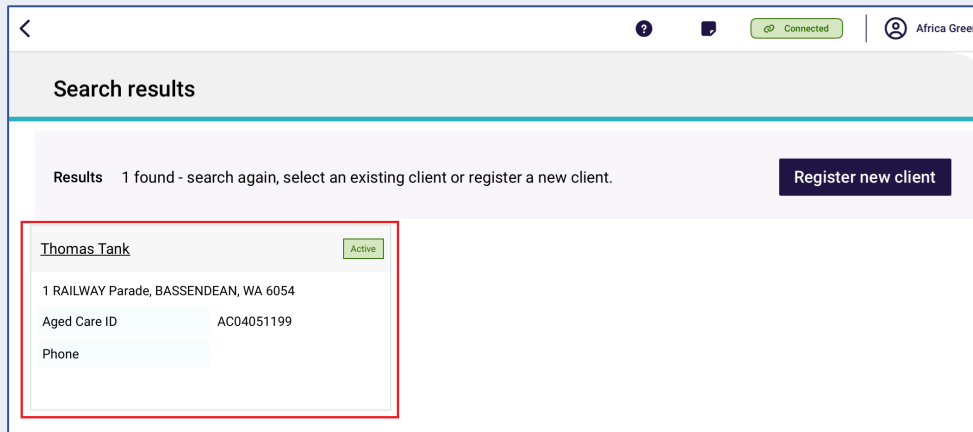
Please enter the date of birth. If not known, enter the client's estimated age.

Date of Birth Estimated Age

* Date of birth: 01/05/1970

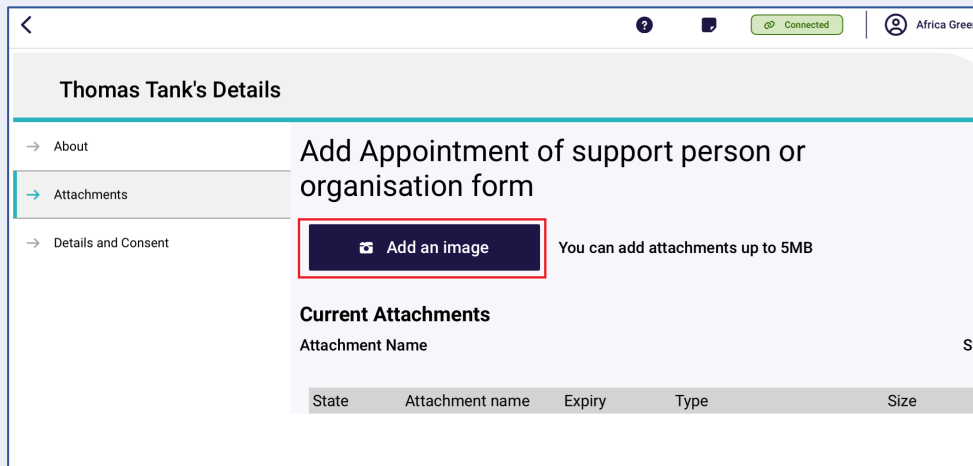
Register

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



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

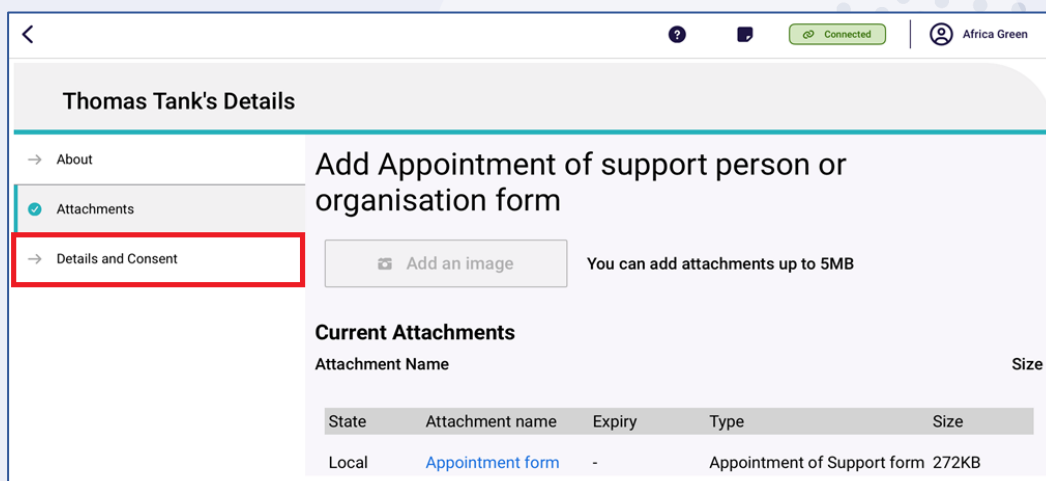
7. The **Attachments** page appears. Add the appointment of support person form by selecting **Add an image**.



8. Name the image.

The pre-selected Type is 'Appointment of Support Form.' Select **Done**, and the Type text box will be filled. Select **Capture photo** to take a picture of the form.

Finally, the Form appears in the **Current Attachments** section. Then go to **Details and Consent**.



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

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

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

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

As every response is defaulted to No initially, there will be error messages about not being able to submit the relationship request.

As soon as appropriate responses are entered, these error messages will disappear.

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

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

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

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

Then, select **Create Relationship**.

Thomas Tank's Details

→ About

● Attachments

✓ Details and Consent

Supporter consent

Has this support person consented to register?

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

Yes No

I declare that:

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

I understand and have read:

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

View duties of a supporter

View terms and conditions of registering

Create relationship

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

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

Consent is not required for Supporter Guardian relationships.

! A pending relationship is created if:

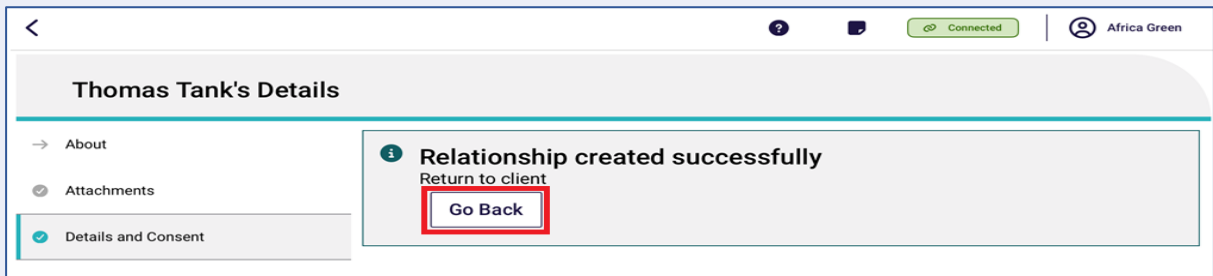
- either the client or supporter do not provide their consent for the relationship to be set up (applicable for individual supporters only)
- the start date of the relationship is in the future
- a Supporter guardian relationship is being created.

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

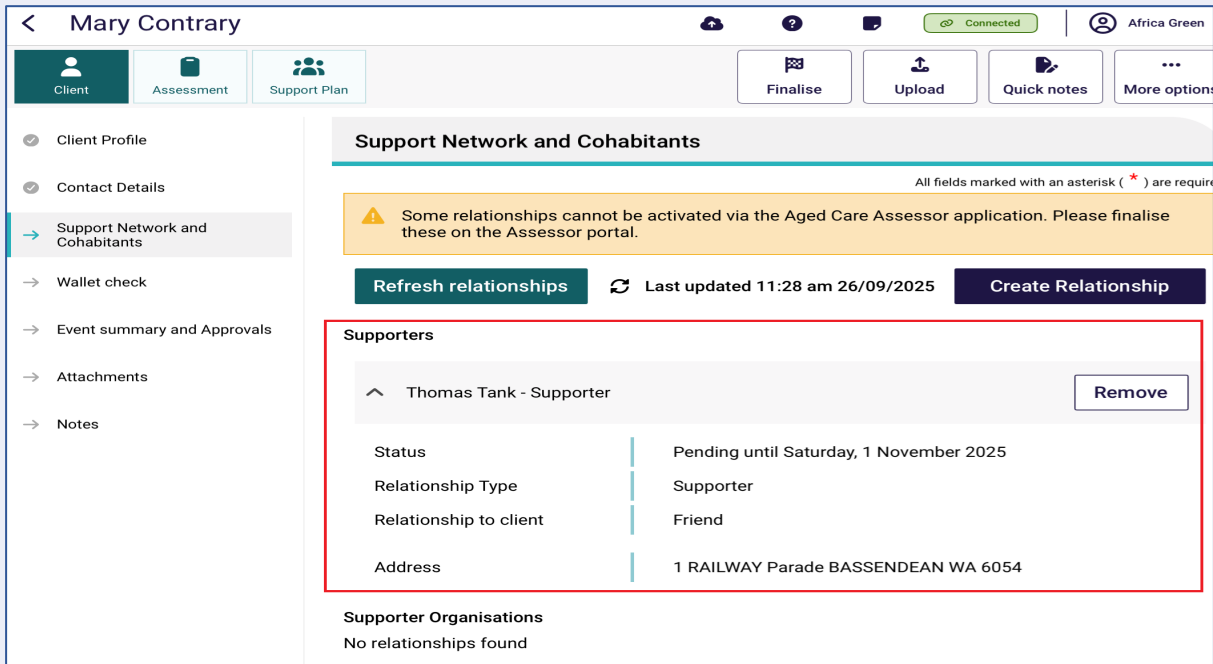
! If a supporter declares a conflict of interest in being registered in a support relationship, you will not be able to submit this support relationship request via the App. To discuss this further, please call the My Aged Care contact centre.

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

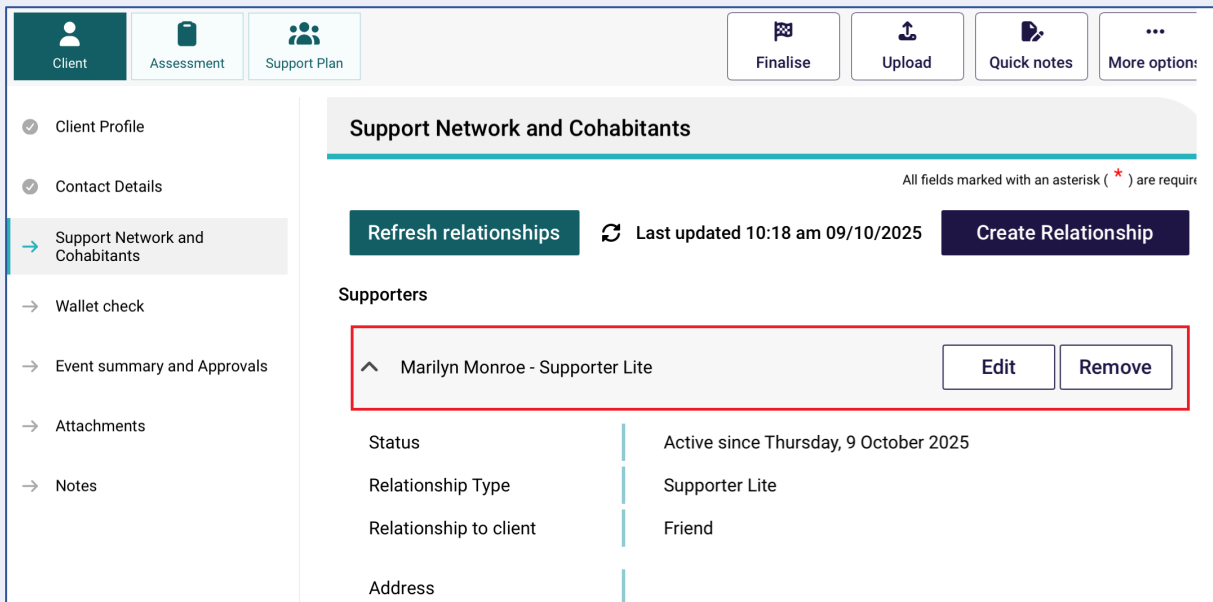




The below image shows a Pending Supporter relationship who is a friend of the client.



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



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

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

- About
- Attachments
- Details and Consent

Client Consent *

Has Thomas Tank consented to Marilyn Monroe registering as their Supporter and accessing their information in My Aged Care in order to act on their behalf?

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

Yes
No

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

Yes
No

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

Create relationship

10.2 Creating a relationship for a supporter guardian

You must be connected to the Internet.

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

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

← Billy Banter
Connected
Africa Green

- Client
- History
- Support Plan

Upload

Quick notes

More options

Support Network and Cohabitants

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

Refresh relationships

Last updated 10:37 am 29/09/2025

Create Relationship

Supporters
No relationships found

Supporter Organisations
No relationships found

Agent Organisations
No relationships found

People that Billy Banter supports
No relationships found

Other Relationships
No relationships found

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

← Billy Banter

Billy Banter

All fields marked with an asterisk (*) are required

Create Relationship

* The support relationship Billy would like to establish is:

Supporter Guardian

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

Next

Done

Supporter
Supporter Guardian
Agent
Carer
Emergency Contact

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

← Billy Banter

Billy Banter

All fields marked with an asterisk (*) are required

Create Relationship

* The support relationship Billy would like to establish is:

Supporter Guardian

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

Next

Done

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

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

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

< Billy Banter

Billy Banter

All fields marked with an asterisk (*) are required

Create Relationship

* The support relationship Billy would like to establish is:

Supporter Guardian

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

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

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

Yes No

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

Yes No

Next

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

< Billy Banter

Billy Banter

All fields marked with an asterisk (*) are required

Create Relationship

* The support relationship Billy would like to establish is:

Supporter Guardian

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

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

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

Yes No

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

Yes No

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

Next

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

Enter the last name and first name of your supporter, and select **Search**.

This is to ensure that there are no duplicate record being accidentally made in the My Aged Care system.

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



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

There are five pages in the **Register a Supporter** section: **Personal Details**, **Address Details**, **Identity Match**, **Attachments**, and **Details and Consent**.

Enter all mandatory fields in each of the five pages until the Register button turns blue.

Then, select **Register**.

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

< Back

Register a Supporter

All fields marked with an asterisk (*) are required

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

Title

*** First name**

Ronald 6 of 50

Middle name

0 of 50

*** Last name**

Weasley 7 of 50

*** Gender**

Male

Date of birth / estimated age*

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

Date of Birth Estimated Age

*** Date of birth**

01/05/1970

Register

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

< ? Connected Africa Green

Search results

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

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

Hermione Granger Active

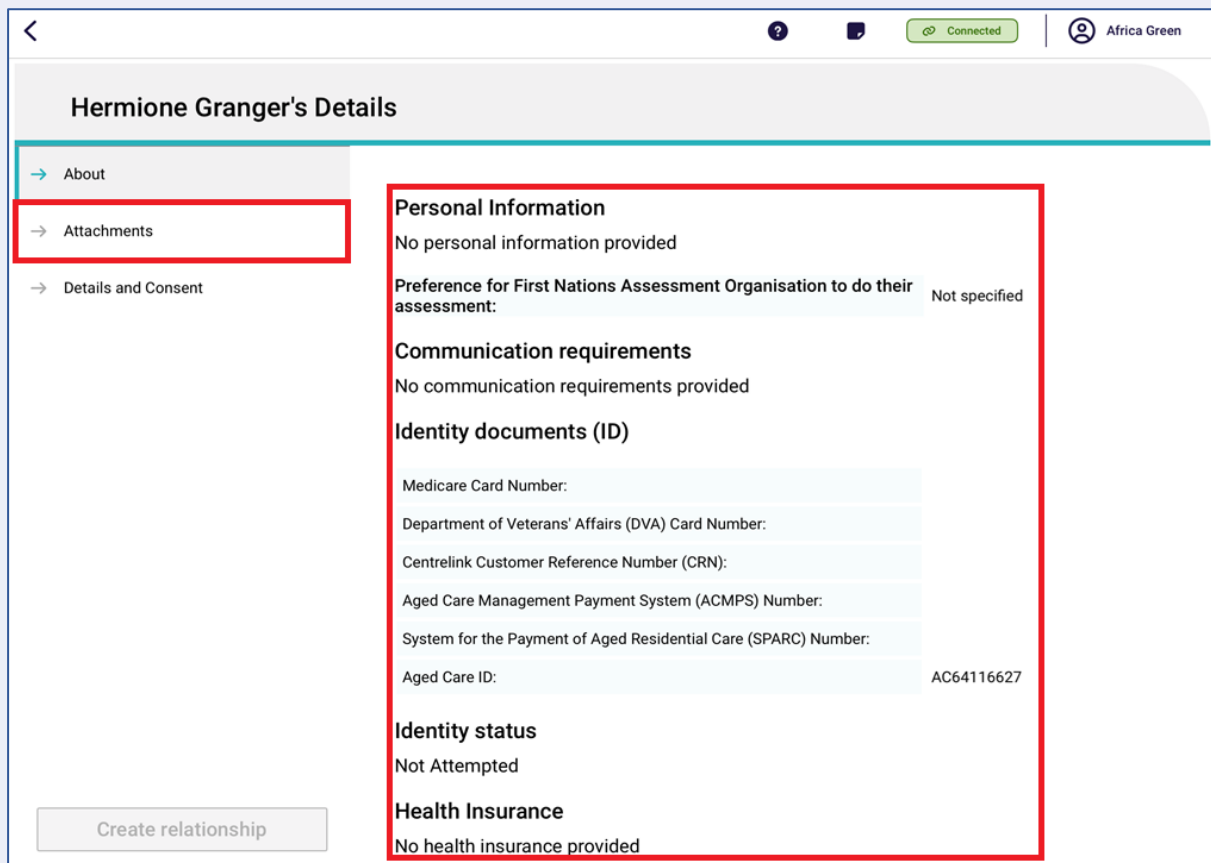
Aged Care ID AC64116627

Phone

The Support Person's details page appears.

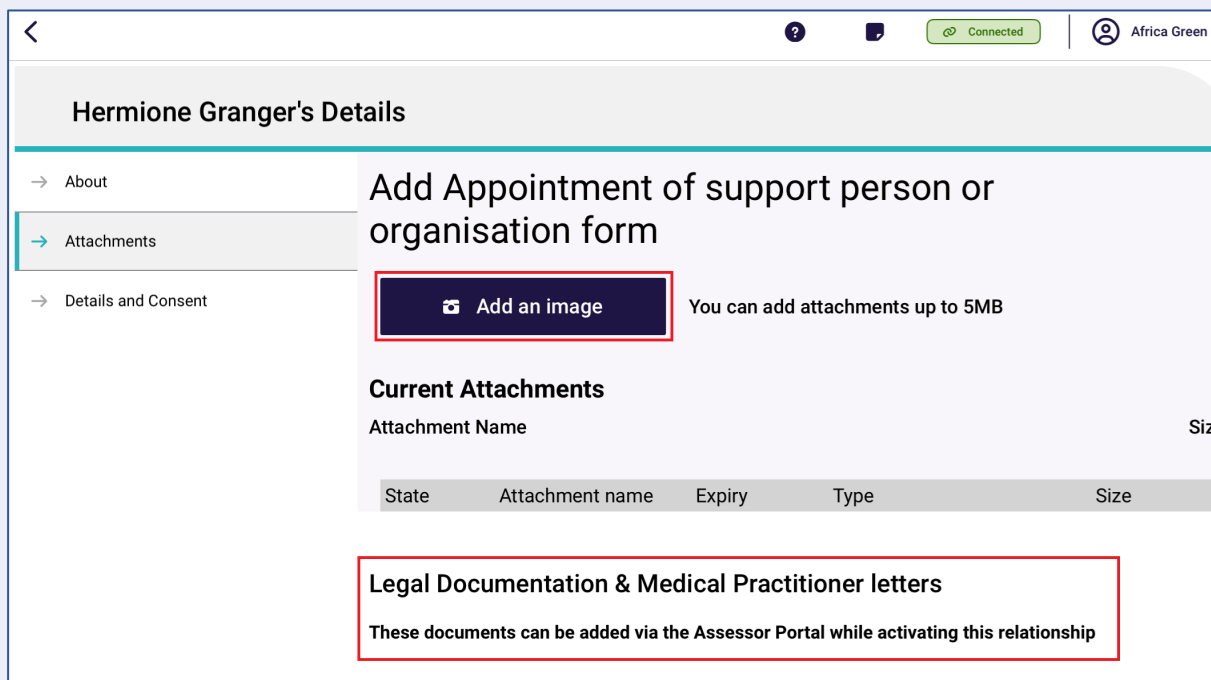
Double check that it ^Bs correct, then select **Attachments**.





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

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



- Name the image.

The pre-selected Type is 'Appointment of Support Form.' Select **Done**, and the Type text box will be filled. Then, select **Capture photo** to take a picture of the form.


Add attachment


* **Name**

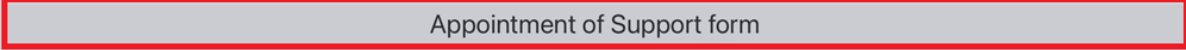
Appointment form 16 of 146

* **Type**

Description







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

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

<
Connected
Africa Green

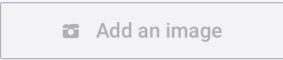
Hermione Granger's Details

→ About

Attachments

→ Details and Consent

Add Appointment of support person or organisation form



You can add attachments up to 5MB

Current Attachments

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

Legal Documentation & Medical Practitioner letters

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

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

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

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

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

← ? Connected | Africa Green

Hermione Granger's Details

→ About

✓ Attachments

→ Details and Consent

Details

⚠ Supporter Guardians can be only created as pending.

❗ The following fields are mandatory or invalid:
- Relationship Type
- Consent from relevant parties to establish support relationship

* Relationship type

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

* Start date

 📅

End date

 📅

Scroll down to the **Consent** section.

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

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

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

- ❗ Consent is not required for Supporter Guardian relationships.
- ❗ All Supporter Guardian relationships made in the app will be Pending. To activate a pending relationship, go to [Activating a pending relationship](#).
- ❗ If a supporter declares a conflict of interest in being registered in a support relationship, you will not be able to submit this support relationship request via the App. To discuss this further, please call the My Aged Care contact centre.

Hermione Granger's Details

→ About

☑ Attachments

☑ Details and Consent

Consent

Not required

Supporter Guardian consent

Has this support person consented to register?

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

Yes No

Does this support person have a conflict of interest?

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

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

Yes No

*** Conflict of interest description**

Conflict of interest details go here

36 of 500

I declare that:

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

I understand and have read:

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

View duties of a supporter

View terms and conditions of registering

Create relationship

10. An information banner displays.

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

Hermione Granger's Details

→ About

☑ Attachments

☑ Details and Consent

Relationship created successfully

Return to client

Go Back

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

The screenshot shows a user interface for a client named Billy Banter. The top navigation bar includes a back arrow, the client name, and a 'Connected' status. Below this is a menu with 'Client', 'History', and 'Support Plan' options. The main content area is titled 'Support Network and Cohabitants' and features a 'Refresh relationships' button, a timestamp 'Last updated 10:53 am 29/09/2025', and a 'Create Relationship' button. A list of supporters is shown, with details for 'Hermione Granger - Supporter Guardian' including status, relationship type, and relationship to client.

10.3 Creating a relationship for a supporter organisation

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

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

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

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

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

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

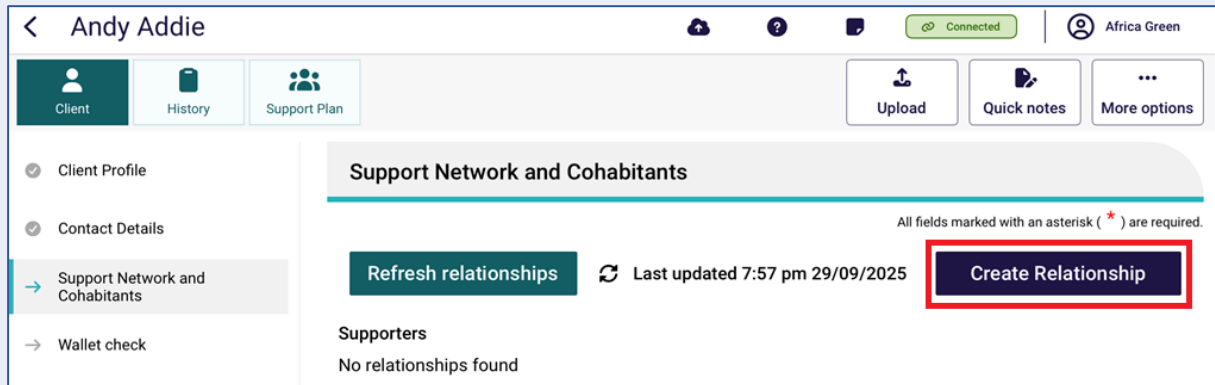
A **Supporter Organisation – Supporter Name – Supporter relationship** has:

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

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

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

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



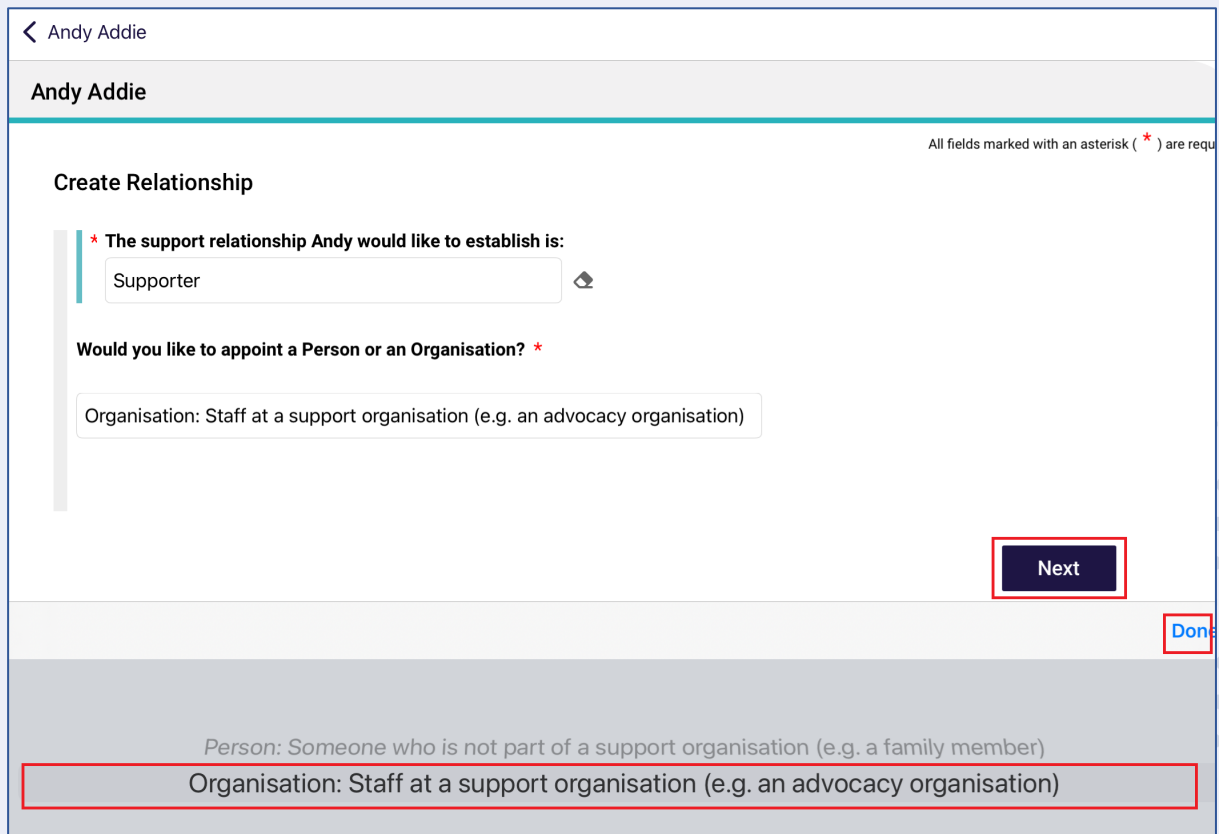
2. In the **Create Relationship** page, choose a relationship to establish for the client.

In this case it would be **Supporter**.

The next question **Would you like to appoint a person or an organisation?** appears.

Choose **Organisation: staff at a support organisation (e.g., An advocacy organisation)**.

Then, select **Next**.



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

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

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

Search by Organisation Name Example

[← Back](#)

Add a Supporter Organisation

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

Search for Support Organisation by:

Organisation Name

Search by Distance and Postcode Example

[← Back](#)

Add a Supporter Organisation

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

Search for Support Organisation by:

Postcode

Distance

[Done](#)

40km
60km
80km
100km

4. Select the supporter organisation's card.

← Back

Add a Supporter Organisation

All fields marked with an asterisk (*) are required

2 matching results

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

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

← Back

Add a Supporter Organisation

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

Organisation details

- About
- ☑ Attachments
- Details and Consent

Organisation Name
Access Community Services

Branch
Access Community Care Finder - PHN South Brisbane

Phone number
+610255023668

Address
95 7 WEMBLEY Road,LOGAN CENTRAL,QLD 4114

Support offered
Supporter

6. The **Attachments** page appears. Add the appointment of support organisation form by selecting **Add an image** and taking an image of the form from your device.

Name the image and its name will appear under **Current Attachments**.

Then, continue to the **Details and Consent** page.

← Back

Add a Supporter Organisation

All fields marked with an asterisk (*) are required

Organisation details

- About
- ☑ Attachments
- Details and Consent

Add Appointment of support person or organisation form

Add an image You can add attachments up to 5MB

Current Attachments

Attachment Name	Siz			
State	Attachment name	Expiry	Type	Size

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

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

When this page first appear there will be an error message saying that there are mandatory fields to complete or invalid fields.

This error message will continue to display until all mandatory fields are completed correctly.

All supporter workers of this organisation will be able to assist the client.

However if the client only want to work with one particular person, enter their name in the **Full name of the support person** section.

The screenshot shows a mobile application interface for 'Add a Supporter Organisation'. The page title is 'Add a Supporter Organisation' and the current section is 'Details and Consent'. A navigation menu on the left includes 'About', 'Attachments', and 'Details and Consent'. The main content area has a red error banner stating: 'The following fields are mandatory or invalid: - Consent to register'. Below this, it says 'All support workers at the organisation will be able to assist the client. If the client only wants to work with one person that they already know, please enter their full name here'. There is a text input field for 'Full name of the support person' with a character count of '0 of 100'. Below that, it says 'Please select a start date for this relationship, and enter an end date if it will be time limited.' There are two date pickers: 'Start date' with the value '29/09/2025' and 'End date' which is currently blank. A note at the top right says 'All fields marked with an asterisk (*) are required'.

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

There are two sections to the Client consent: the top section describes the consent to registering the supporter organisation as the client's supporter.

The bottom section describes consent to share any information given to the client to be also given to the supporter organisation.

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

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

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

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

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

< Back

Add a Supporter Organisation

All fields marked with an asterisk (*) are required

Organisation details

→ About

✓ Attachments

→ Details and Consent

Create Relationship

Client consent

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

Yes No

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

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

Yes No

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

I declare that:

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

I understand and have read:

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

i View duties of a supporter ▶

i View terms and conditions of registering ▶

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

< Back

Add a Supporter Organisation

All fields marked with an asterisk (*) are required

Organisation details

→ About

✓ Attachments

✓ Details and Consent

Client consent

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

Yes No



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

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

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

Note that this question applies to both the supporter organisation and/or to the particular supporter inside the supporter organisation, depending on whether a particular support person was named.

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

Then, select **Create Relationship**.

[Back](#)

Add a Supporter Organisation

All fields marked with an asterisk (*) are required

Organisation details

- About
- Attachments
- Details and Consent**

Supporter consent

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

Yes No

Does this support person have a conflict of interest?

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

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

Yes No

*** Conflict of interest description**

Maximum 500 characters

0 of 500

I declare that:

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

I understand and have read:

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

[View duties of a supporter](#)

[View terms and conditions of registering](#)

Create Relationship

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

Andy Addie

Add a Supporter Organisation

All fields marked with an asterisk (*) are required

Organisation details

- About
- Attachments
- Details and Consent**

Relationship created successfully

Return to client

Go Back

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

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

Supporter Organisation relationships appear underneath the **Supporter Organisations** heading as **[Supporter Organisation Name] – Supporter**.

It is created in a Pending status, and able to be activated or removed by selecting the **Activate** and **Remove** buttons respectively.

Andy Addie

Client | History | Support Plan

Upload | Quick notes | More options

Client Profile

Contact Details

Support Network and Cohabitants

Wallet check

Event summary and Approvals

Attachments

Notes

Refresh relationships | Last updated 10:12 pm 29/09/2025 | Create Relationship

Supporters

No relationships found

Supporter Organisations

Access Community Services - Supporter	Activate	Remove
Status	Pending since Monday, 29 September 2025	
Relationship Type	Supporter	
Branch	Access Community Care Finder - PHN South Brisbane	
Address	95 7 WEMBLEY Road LOGAN CENTRAL QLD 4114	

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

The screenshot shows the 'Support Network and Cohabitants' section for a client named Andy Addie. The page includes a sidebar with navigation options like Client Profile, Contact Details, and Support Network and Cohabitants. The main content area has a 'Supporter Organisations' section highlighted with a red box. It lists one organisation: 'Access Community Services - Supporter Lite'. The status is 'Pending since Monday, 29 September 2025'. Other details include 'Supporter Lite' as the relationship type, 'Access Community Care Finder - PHN South Brisbane' as the branch, and '95 7 WEMBLEY Road LOGAN CENTRAL QLD 4114' as the address. A 'Remove' button is visible next to the organisation name. A warning banner above the table indicates 'Relationship Undergoing Delegate Approval'.

Supporter Organisations	
Access Community Services - Supporter Lite	Remove
⚠ Relationship Undergoing Delegate Approval	
Status	Pending since Monday, 29 September 2025
Relationship Type	Supporter Lite
Branch	Access Community Care Finder - PHN South Brisbane
Address	95 7 WEMBLEY Road LOGAN CENTRAL QLD 4114

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

The relationship can be removed.

The screenshot shows the 'Support Network and Cohabitants' section for a client named Andy Addie. The page includes a sidebar with navigation options like Client Profile, Contact Details, and Support Network and Cohabitants. The main content area has a 'Supporter Organisations' section highlighted with a red box. It lists one organisation: 'Leamington Aged Care Pty Ltd - Sammy Supporter - Supporter'. The status is 'Pending since Monday, 29 September 2025'. Other details include 'Supporter' as the relationship type, 'Golden Grove Outlet' as the branch, and '2 HIGH Street SOUTHPORT QLD 4215' as the address. A 'Remove' button is visible next to the organisation name. A warning banner above the table indicates 'Some relationships cannot be activated via the Aged Care Assessor application. Please finalise these on the Assessor portal.'

Supporter Organisations	
Leamington Aged Care Pty Ltd - Sammy Supporter - Supporter	Remove
Status	Pending since Monday, 29 September 2025
Relationship Type	Supporter
Branch	Golden Grove Outlet
Address	2 HIGH Street SOUTHPORT QLD 4215



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

The relationship can be removed.

Andy Addie

Client Profile

Contact Details

Support Network and Cohabitants

Wallet check

Event summary and Approvals

Attachments

Notes

Support Network and Cohabitants

All fields marked with an asterisk (*) are required

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

Refresh relationships

Last updated 9:51 am 30/09/2025

Create Relationship

Supporters

No relationships found

Supporter Organisations

Access Community Services - Sarah Supporter - Supporter Lite

Remove

Status: Pending since Tuesday, 30 September 2025

Relationship Type: Supporter Lite

Branch: Access Community Care Finder - PHN South Brisbane

Address: 95 7 WEMBLEY Road LOGAN CENTRAL QLD 4114

10.4 Creating a relationship for an agent organisation

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

Jules Angelstar

Client Profile

Contact Details

Support Network and Cohabitants

Support Network and Cohabitants

All fields marked with an asterisk (*) are required

Refresh relationships

Last updated 2:24 pm 29/09/2025

Create Relationship

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

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

< Jules Angelstar

Jules Angelstar

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

Create Relationship

* The support relationship Jules would like to establish is:

Agent

Next

Done

Supporter
Supporter Guardian
Agent
Carer
Emergency Contact
GP

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

Organisation Name example

< Back

Add an Agent Organisation

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

Search for Support Organisation by:

Post Code Organisation Name

Search

Organisation Name

Postcode and Distance example

[Back](#)

Add an Agent Organisation

All fields marked with an asterisk (*) are required

Search for Support Organisation by:

MELBOURNE VIC 3000 60km

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

4. Select the agent organisation's card.

[Back](#)

Add an Agent Organisation

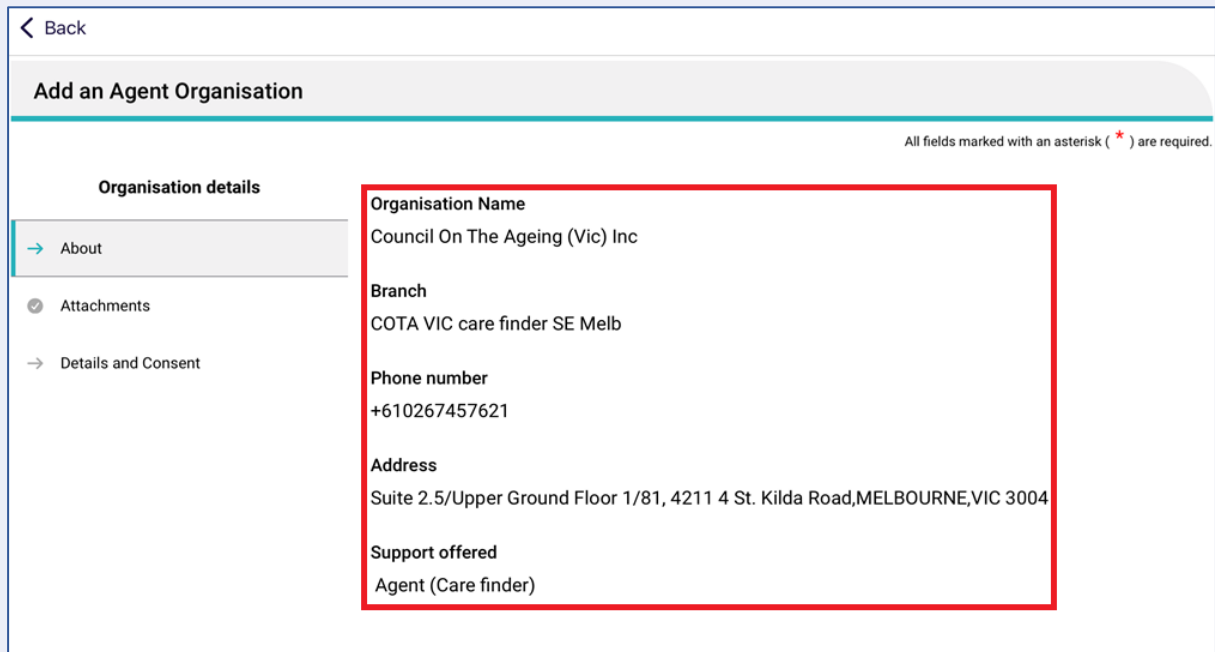
All fields marked with an asterisk (*) are required

54 matching results

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

5. The agent organisation's details display.

Make sure the details are correct, then go to the **Attachments** page.



The screenshot shows the 'Add an Agent Organisation' page. On the left is a sidebar with 'Organisation details' and sub-items: 'About', 'Attachments' (selected), and 'Details and Consent'. The main content area displays the following details:

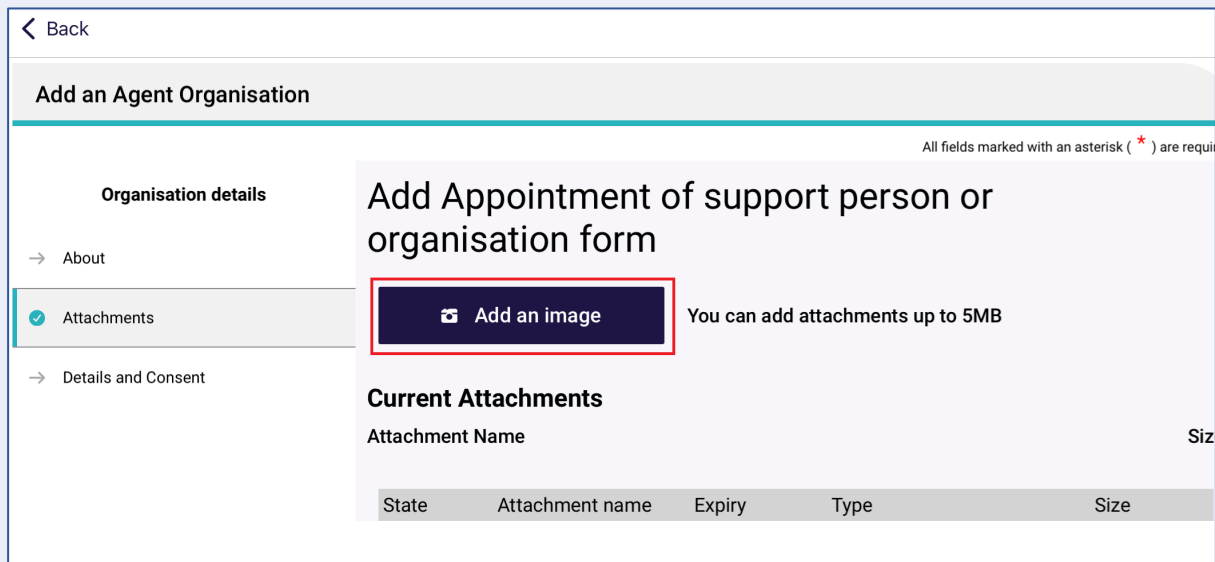
- Organisation Name:** Council On The Ageing (Vic) Inc
- Branch:** COTA VIC care finder SE Melb
- Phone number:** +610267457621
- Address:** Suite 2.5/Upper Ground Floor 1/81, 4211 4 St. Kilda Road, MELBOURNE, VIC 3004
- Support offered:** Agent (Care finder)

A red box highlights these details. A note at the top right states: 'All fields marked with an asterisk (*) are required.'

6. The **Attachments** page appears. Add the appointment of support organisation form by selecting **Add an image** and taking an image of the form from your device.

Name the image and its name will appear under **Current Attachments**.

Then, continue to the **Details and Consent** page.



The screenshot shows the 'Add an Agent Organisation' page with the 'Attachments' section selected in the sidebar. The main content area displays:

- Add Appointment of support person or organisation form**
- Add an image** button (highlighted with a red box)
- Text: 'You can add attachments up to 5MB'
- Current Attachments** section with a table header:

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

7. The **Details and Consent** page is displayed.

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

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

For **Support Required**, select the listing from the drop down menu, then select **Done**.

This will then display in the text box. These values come directly from the agent organisation chosen from Step 4 and therefore may have more than one value displayed.

All agents at the agent organisation will be able to assist the client.

Optionally, you can nominate the full name of one agent, in the **Full name of the support person** section.

< Back

Add an Agent Organisation

All fields marked with an asterisk (*) are required

Organisation details

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

Details

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

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

Full name of the support person

0 of 100

* Support required

Done

Care finder

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

There are two sections:

- the client's consent at the top, and
- the agent organisation's consent at the bottom.

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

The client must consent for the agent organisation relationship to be created. The agent organisation may consent now, or later.

The **Create Relationship** button will activate once the conditions are satisfied.

Then, select **Create Relationship**.

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

< Back

Add an Agent Organisation

All fields marked with an asterisk (*) are required

Organisation details

→ About

→ Attachments

→ Details and Consent

Consent

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

I declare that:

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

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

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

I understand that:

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

Yes

No

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

I declare that:

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

I understand that:

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

Yes

No

Create Relationship

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

< Back

Add an Agent Organisation

All fields marked with an asterisk (*) are required

Organisation details

→ About

→ Attachments

→ Details and Consent

Consent

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

I declare that:

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

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

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

I understand that:

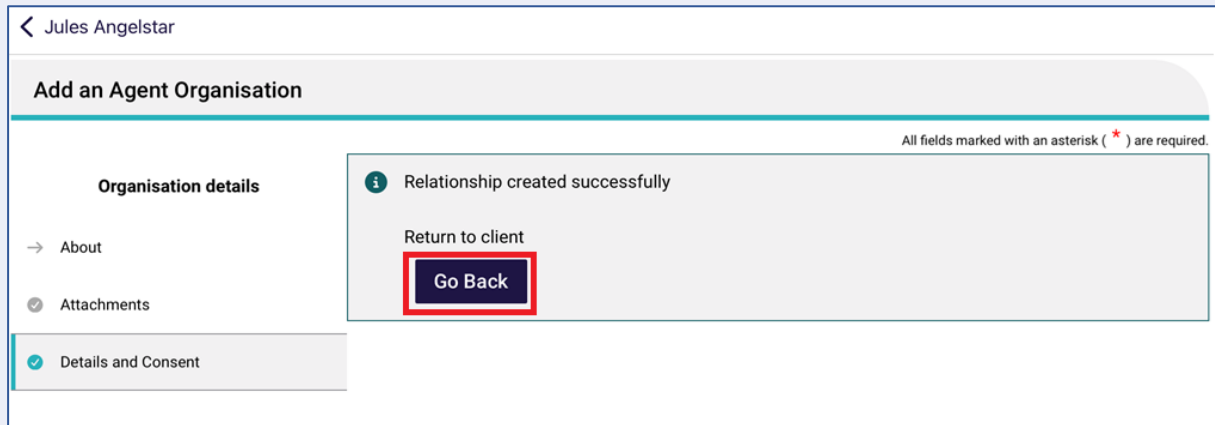
- Making this Appointment will create a Client Record for me in My Aged Care, if I don't already have one.
- This Appointment is specific to interactions with My Aged Care.
- My agent may receive correspondence about me from My Aged Care.
- I can cancel this Appointment at any time by calling My Aged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

Yes

No



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

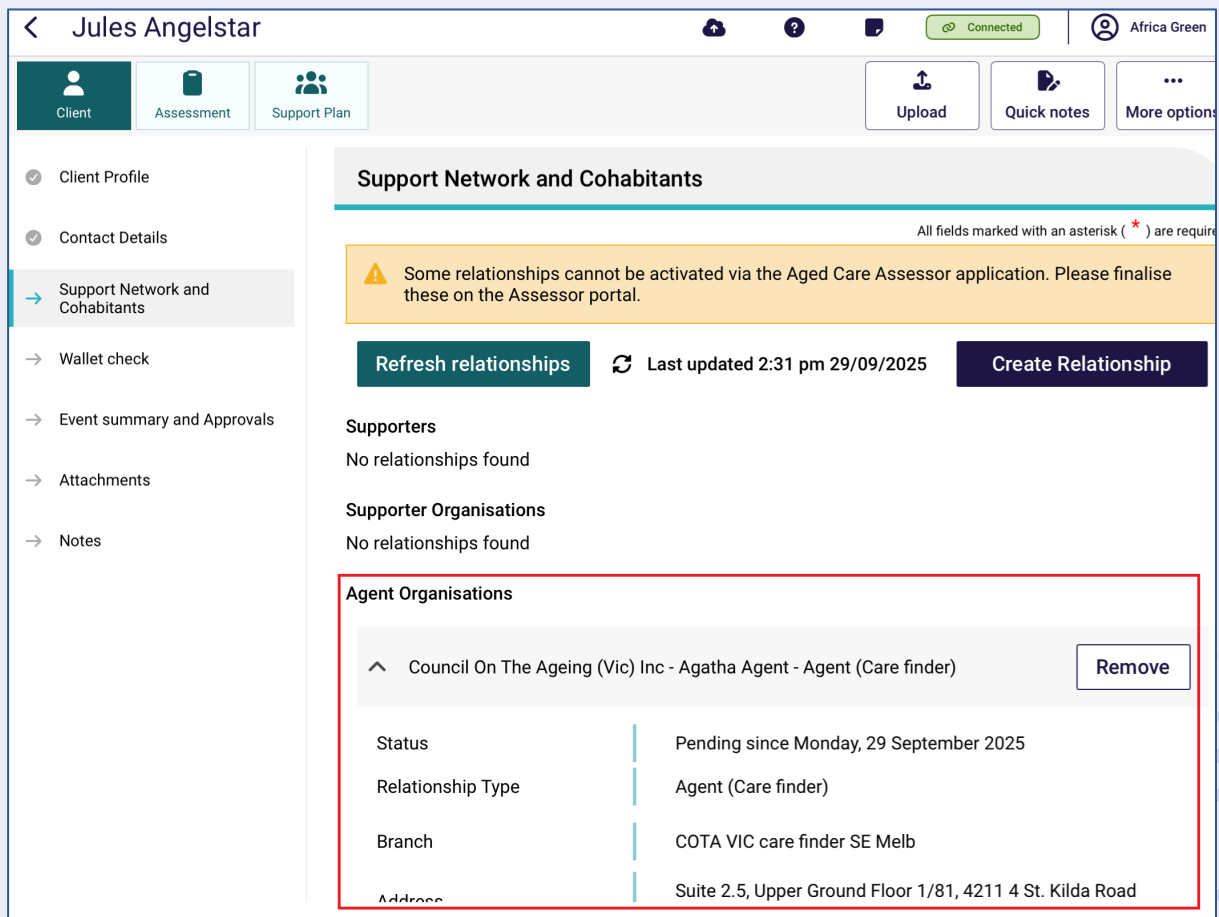


10. Once on the client's record, the new agent organisation relationship will be visible.

Some relationships cannot be activated via this app.

An information banner will appear at the top section of the **Support Network and Cohabitants** page. Please finalise these on the Assessor portal.

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



10.5 Creating a relationship for a carer or other support people

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

The support person does not have to be present, and consent is not required.

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

Andy Addie

Client Profile

Contact Details

Support Network and Cohabitants

Refresh relationships

Last updated 3:03 pm 30/09/2025

Create Relationship

All fields marked with an asterisk (*) are required

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

Then, select **Next**.

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

Andy Addie

Create Relationship

* The support relationship Andy would like to establish is:

Carer

Next

Done

Supporter

Supporter Guardian

Agent

Carer

Emergency Contact

GP

Support Person

All fields marked with an asterisk (*) are required

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

Find a support person

Before registering a new client, check the client exists

First name	Last name	Aged Care ID
<input type="text"/>	<input type="text"/>	AC- eg. 12345678
0 of 50	0 of 50	0 of 8

> Advanced search

Search

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

Search results

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

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

Ginny Weasley Active

78 HODDLE Street, ROBERTSON, NSW 2577

Aged Care ID AC06439665

Phone 0212345678 (home)

[Create Supporter Relationship](#)

If you cannot find the support person's record, try other search parameters or select **Create Supporter Relationship**, then go to step **4A**.

Find a support person

Before registering a new client, check the client exists

First name	Last name	Aged Care ID
Henry	Goldsborough	AC- eg. 12345678
5 of 50	12 of 50	0 of 8

> Advanced search

Search

No records returned

[Create Supporter Relationship](#)

- 4A. To register a new support person, Enter all mandatory fields in each of the pages shown with red asterisks, and until the **Register** button turns blue. Then, select **Register** and go to Step 8. The number and type of pages will vary depending on the relationship being created.

Search Results

Register a Support Person

All fields marked with an asterisk (*) are required

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

The following fields are mandatory or invalid:

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

Title

*** First name**

 5 of 50

Middle name

 0 of 50

*** Last name**

 6 of 50

*** Gender**

Date of birth / estimated age *

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

Date of Birth Estimated Age

Register

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

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

Search Results

Register a Support Person

All fields marked with an asterisk (*) are required

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

Call back details

Request call back from Carer Gateway *

Yes No

Client's consent for Carer Gateway *

Yes No

Carer's consent for Carer Gateway *

Yes No

Request call back from National Dementia Helpline *

Yes No

Client's consent for National Dementia Helpline *

Yes No

Carer's consent for National Dementia Helpline *

Yes No

Client contact details

Contact number

Email address

Register

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

Ginny Weasley's Details

- About
- Call back details
- Details and Consent

Health Insurance
No health insurance provided

Address details

Home address:	78-80 HODDLE Street ROBERTSON NSW 2577
Service delivery address:	78-80 HODDLE Street ROBERTSON NSW 2577
Send any correspondence to:	78-80 HODDLE Street ROBERTSON NSW 2577

Contact details

Preferred contact method:	
Home phone:	0212345678 (home)
Mobile:	
Business:	
Other:	
Fax:	
Email:	ginny.weasley@hp.com.au (email)

Create relationship

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

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

This page is not applicable to other relationship types.

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

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

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

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

Ginny Weasley's Details

→ About

→ Call back details

→ Details and Consent

Call back details

Request call back from Carer Gateway *

Yes No

Client's consent for Carer Gateway *

Yes No

Carer's consent for Carer Gateway *

Yes No

Request call back from National Dementia Helpline *

Yes No

Client's consent for National Dementia Helpline *

Yes No

Carer's consent for National Dementia Helpline *

Yes No

Client contact details

Contact number +610298765432

Email address Janderson@mac.com.au

Home address 2 HARGRAVE Street
MORAYFIELD
QLD 4506

Carer contact details

Contact number

Email address ginny.weasley@hp.com.au

Home address 78 HODDLE Street
ROBERTSON
NSW 2577

*** Residential Region**

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

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

Create relationship

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

Ginny Weasley's Details

→ About

→ Call back details

→ Details and Consent

Details

*** Relationship type**

Friend 📍

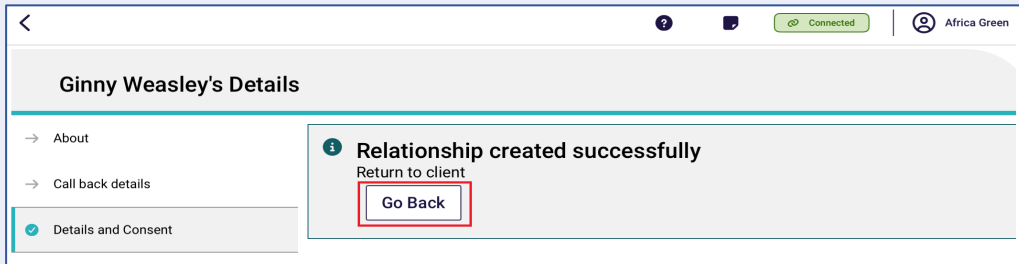
Consent

Not required

Create relationship

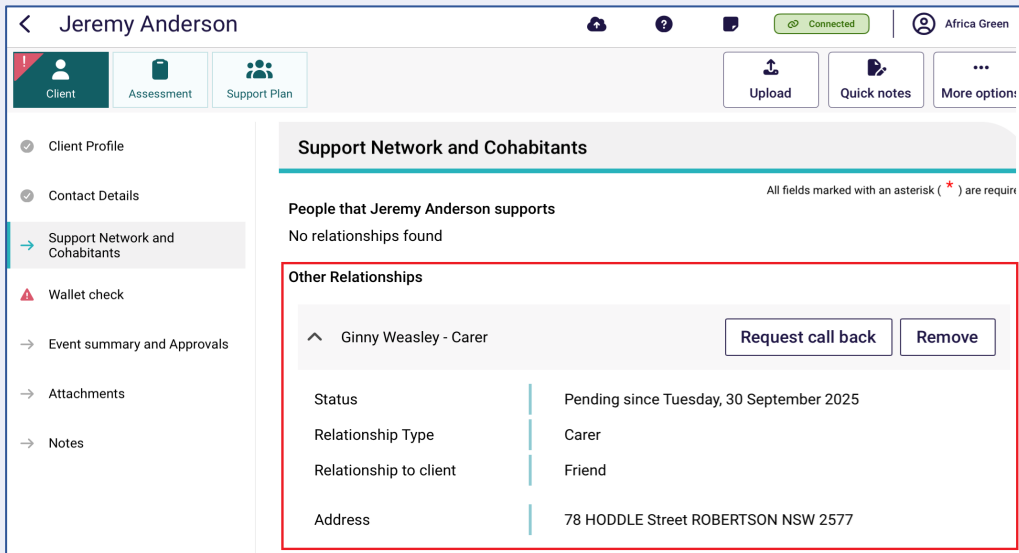
! There is no Consent section for an Emergency Contact relationship or a Support Person relationship. There are no Details or Consent sections for a GP Relationship.

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

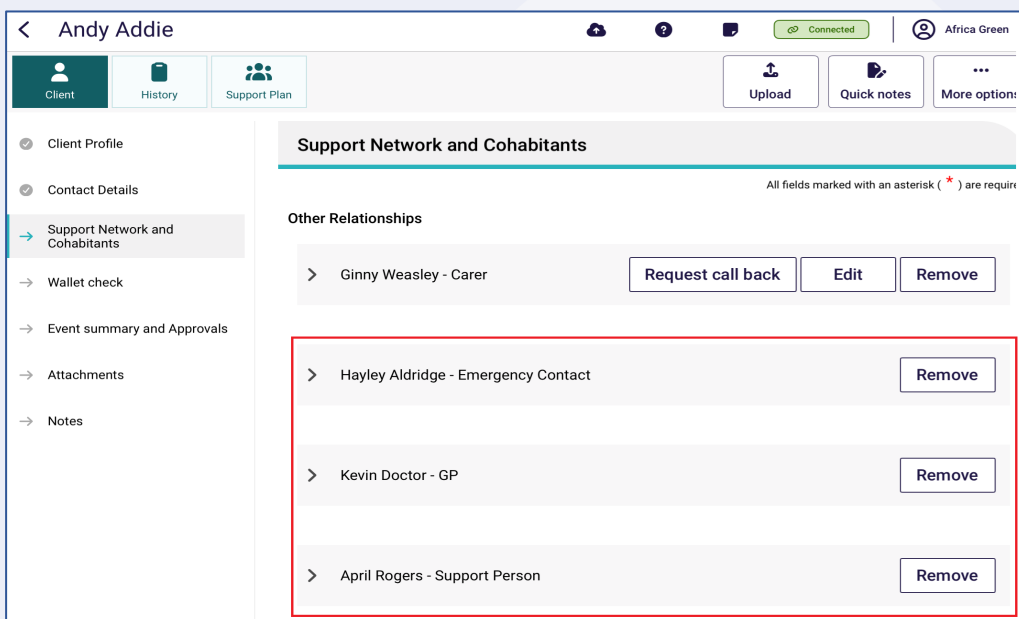


9. The support person relationship is now displayed on the client's **Support Network and Cohabitants** page.

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



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



10.6 Creating a relationship in offline mode

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

! You must be online to register and set up a relationship. Any support people created offline will be saved locally to your device.

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



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

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

The screenshot shows the app interface for 'Xavier Banny'. The top navigation bar includes a back arrow, the name 'Xavier Banny', and a 'No internet' status indicator. Below the navigation bar are three tabs: 'Client', 'Assessment', and 'Support Plan'. The 'Support Plan' tab is selected, and the 'Support Network and Cohabitants' section is active. This section contains a 'Refresh relationships' button, a timestamp 'Last updated 11:16 am 02/10/2025', and a prominent 'Create Relationship' button. A note at the bottom right states 'All fields marked with an asterisk (*) are required.'

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

The screenshot shows the 'Save a Supporter' form. The 'Details' section is highlighted with a red box. A red error message states: 'The following fields are mandatory or invalid: - Relationship Type, - Consent from relevant parties to establish support relationship'. The form includes fields for 'Relationship type', 'Start date' (21/05/2025), and 'End date'. A note at the bottom right states 'All fields marked with an asterisk (*) are required.'

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

The screenshot shows the 'Save a Supporter' form with the 'Details and Consent' section selected. The form includes a 'Back' button at the top left. A note states: 'All fields marked with an asterisk (*) are required.' The 'Details and Consent' section contains two questions:

Supporter consent

Has this support person consented to register?

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

Yes No

Does this support person have a conflict of interest?

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

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

Yes No

Save

! Supporter Guardian relationships are created as Pending only.
Use the **Assessor Portal** to complete activating the relationship.

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

The screenshot shows the 'Save a Supporter' form with the 'Details and Consent' section selected. A success banner is displayed in the center of the form:

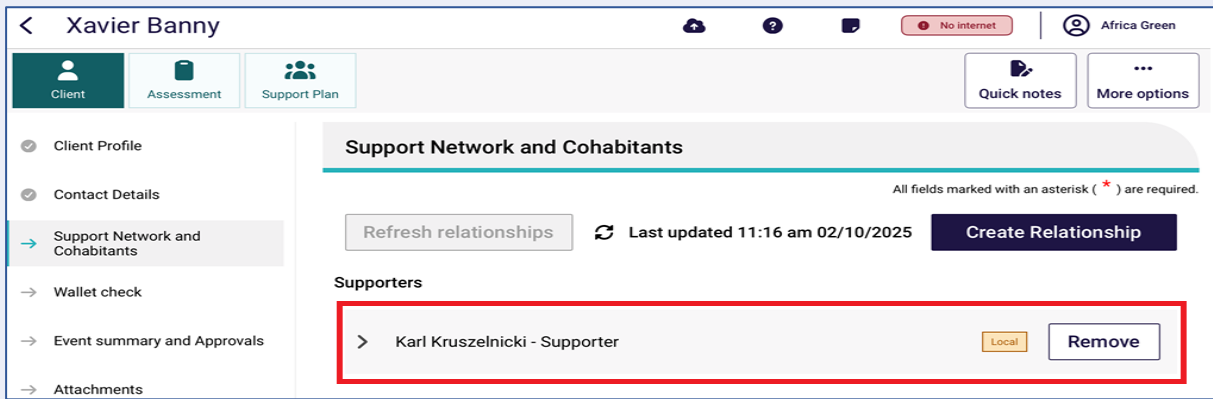
Local Relationship saved successfully
Return to client

Go Back

The new supporter relationship will appear on the **Relationships and cohabitants** page.

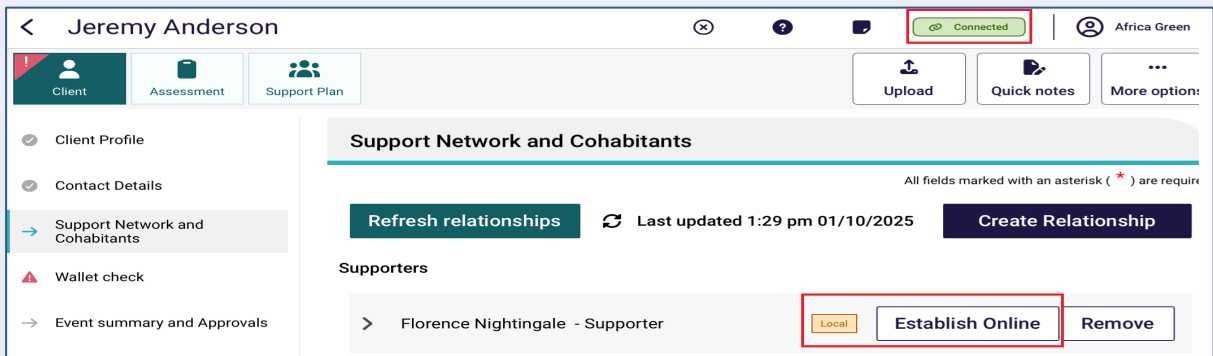
In the case of supporter guardians, a banner appears: **Some relationships cannot be activated via the App. Please finalise these on the Assessor portal.**

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

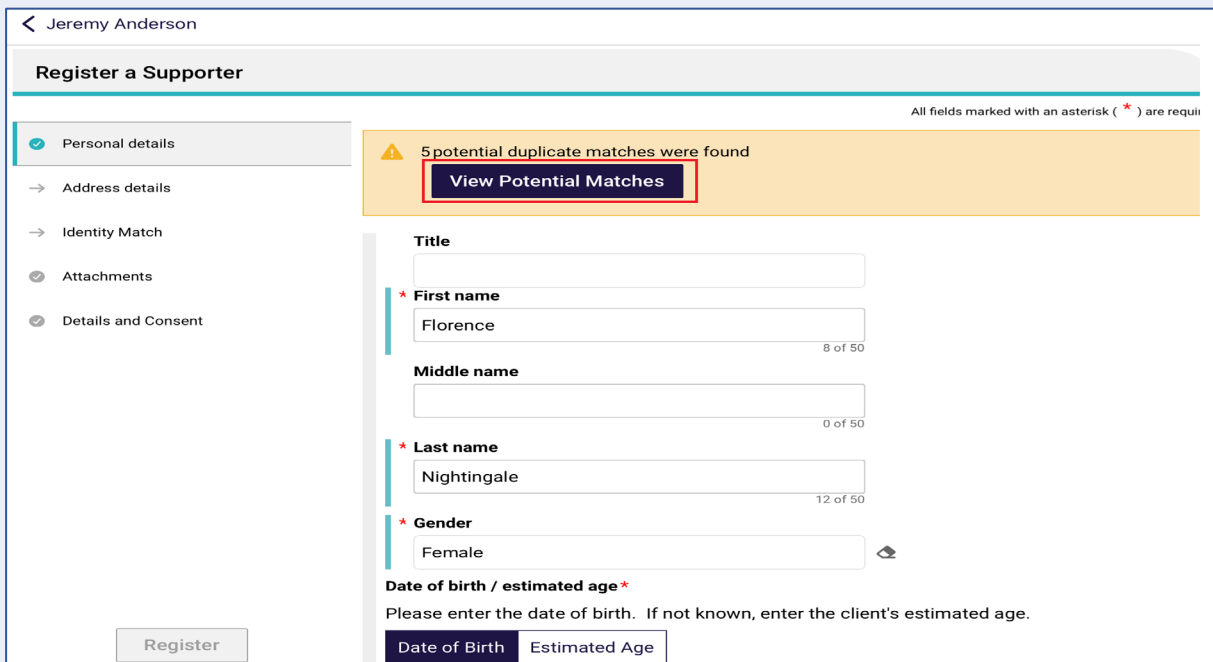


10.7 Establishing an offline relationship

1. To activate (establish) offline relationships, you will need to make sure there is Internet connectivity by checking for the Connected symbol at the top right of the App screen. Then, select the **Establish Online** button next to the offline (local) relationship listing.



2. The **Register A Supporter** screen appears. The App will look for duplicate records in My Aged Care. If there are duplicate records, an Information message appears at the top of the page. Select **View Potential Matches**. If there are no duplicate matches, continue to Step 4.



3. The **Review Potential duplicate client** page appears.

Review each duplicate by selecting each record listed on the left column under the **Client details** heading.

If you find the correct existing record, select the corresponding **View existing record** button.

Otherwise select the **Use new record** button.

The screenshot shows a web interface for reviewing potential duplicate clients. At the top left, there is a 'Back' button. The main heading is 'Review potential duplicate client'. Below this, there are three columns: 'Client details', 'New client', and 'Existing client'. The 'Client details' column contains a list of five entries, each with a right-pointing arrow and the name 'Florence Nightingale'. The first entry is highlighted with a red border. The 'New client' and 'Existing client' columns contain a comparison table with the following data:

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

At the bottom of the page, there are two buttons: 'Use new record' and 'View existing record'. The 'Use new record' button is highlighted with a red border. Below these buttons is a 'Cancel' button.

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

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

Ensure all mandatory fields are entered or updated in each page until the **Register** button or the **Create Relationship** button turns blue.

Some of these fields may have been pre-filled based on what you have entered whilst the relationship was offline.

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

Existing Record example

< ? [Connected] Africa Green

Florence Nightingale's Details

- About
- Attachments
- Details and Consent

Personal Information
No personal information provided

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

Communication requirements
No communication requirements provided

Identity documents (ID)

Medicare Card Number:

Department of Veterans' Affairs (DVA) Card Number:

Centrelink Customer Reference Number (CRN):

Aged Care Management Payment System (ACMPS) Number:

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

Aged Care ID:

Identity status
Not Attempted

Health Insurance
No health insurance provided

Create relationship

New Record Example

< Jeremy Anderson

Register a Supporter

All fields marked with an asterisk (*) are required

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

Title

* **First name** 8 of 50

Middle name 0 of 50

* **Last name** 11 of 50

* **Gender**

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

* **Date of birth** 📅

Register

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



10.8 Activating a pending relationship

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

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

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

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

The screenshot shows the 'Support Network and Cohabitants' page for client Xavier Benny. The page has a sidebar on the left with navigation options: Client Profile, Contact Details, Support Network and Cohabitants (selected), Wallet check, Event summary and Approvals, Attachments, and Notes. The main content area is titled 'Support Network and Cohabitants' and includes a 'Refresh relationships' button, a refresh icon, and the text 'Last updated 10:49 am 02/10/2025'. Below this, there are three sections: 'Supporters' (No relationships found), 'Supporter Organisations' (No relationships found), and 'Agent Organisations'. Under 'Agent Organisations', there is a list item 'CRSixThreeEightEFT02 - Agent (Advocate)' with an 'Activate' button highlighted in a red box and a 'Remove' button.

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

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

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

The screenshot shows the 'Activation' page for client Xavier Benny. The page has a 'Details' section with a warning banner: 'All support workers at the organisation will be able to assist the client. If the client only wants to work with one person that they already know, please enter their full name here.' Below this is a text input field for 'Full name of the support person'. There is also a dropdown menu for 'Support required' set to 'Advocate'. At the bottom, there are date pickers for 'Start date' (02/10/2025) and 'End date'.

3. Scroll down to the **Consent** section. Update the supporter's consent as required then select **Activate**. (All parties must select **Yes** to their consent section for the relationship to activate.)

< Xavier Banny

Activation

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

Consent

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

I declare that:

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

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

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

I understand that:

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

Yes No

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

I declare that:

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

I understand that:

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

Yes No

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

Select **Go Back**.

< Xavier Banny

Activation

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

i Relationship activated successfully

Return to client

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

The screenshot shows the client profile for Xavier Banny. The 'Support Network and Cohabitants' section is active. It includes a 'Refresh relationships' button, a 'Last updated' timestamp of 10:49 am 02/10/2025, and a 'Create Relationship' button. Below this, there are sections for 'Supporters', 'Supporter Organisations', and 'Agent Organisations'. A single relationship is listed under 'Agent Organisations' for 'CRSixThreeEightEFT02 - Agent (Advocate)'. A 'Remove' button is visible next to this relationship. A table below the relationship shows details: Status (Active since Thursday, 2 October 2025), Relationship Type (Agent (Advocate)), Can make decisions about (Advocate), Branch (AgentOnly Outlet), and Address (6 FURZER Street PHILLIP ACT 2606). The 'Status' field is highlighted with a red box.

10.9 Removing a support relationship

To remove an active or pending relationship:

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

The screenshot shows the client profile for Mary Conrany. The 'Support Network and Cohabitants' section is active. It includes a 'Refresh relationships' button, a 'Last updated' timestamp of 12:09 pm 02/10/2025, and a 'Create Relationship' button. Below this, there are sections for 'Supporters', 'Supporter Organisations', and 'Agent Organisations'. Two relationships are listed under 'Supporters': 'Marilyn Monroe - Supporter' and 'Thomas Tank - Supporter'. Each relationship has an 'Edit' button and a 'Remove' button. The 'Remove' buttons for both relationships are highlighted with red boxes.

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

← Mary Contrary

Remove Marilyn Monroe

Are you sure you would like to remove this relationship?

* Please select the reason for removal

No Longer Required

Remove Cancel

Done

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

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

← Mary Contrary

Client Assessment Support Plan

Finalise Upload Quick notes More options

Client Profile

Contact Details

→ Support Network and Cohabitants

→ Wallet check

→ Event summary and Approvals

→ Attachments

→ Notes

Support Network and Cohabitants

All fields marked with an asterisk (*) are require

Declined, ended and cancelled relationships

Supporters

^ Marilyn Monroe - Supporter

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

11. Completing identity verification

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

1. Open and log in to the App with your password, following the process in [Signing in to the App after activation](#).

The Dashboard will be displayed. Select the client's name on the referral card.

Dashboard

Filters 10 assessments, sorted by Client Last Name

Client Name	Status	Priority	Aged Care ID	Assessment type	Completed
Jonas Abdullah	Self referral	Triage in progress	Medium priority	Comprehensive	18 days overdue
Jonas Abrego	Self referral	Triage not started	Medium priority	Comprehensive	18 days overdue
Harry Boyer	Self referral	Assessment in progress	Low priority	Comprehensive	No current milestone
Harry Cleora	Self referral	Triage not started	High priority	Comprehensive	26 days overdue
Harry Goff	Self referral	Triage in progress	Medium priority	Comprehensive	7 days overdue
Harry Jones	Self referral	Medium priority	Comprehensive	18 days overdue	
Harry Miller	Self referral	Low priority			
Harry Nichols	Self referral	Triage not started	Low priority		
UATFred RTAGT...	Assessment not started	High priority			

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

Harry Boyer

Client Profile

Wallet check

Conduct a wallet check

The client has not yet completed a wallet check

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

Harry Boyer

Client Assessment Support Plan

Upload Quick notes More options

Client Profile

Contact Details

Support Network and Cohabitants

Wallet check

Event summary and Approvals

Attachments

Notes

Wallet check

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

My client has identification

My client has no valid ID at this time

My client is unable to produce ID

Cancel Complete

If you have selected:

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

Harry Boyer

Client Assessment Support Plan

Upload Quick notes More options

Client Profile

Contact Details

Support Network and Cohabitants

Wallet check

Event summary and Approvals

Attachments

Notes

Wallet check

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

My client has identification

My client has no valid ID at this time

My client is unable to produce ID

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

Cancel Complete

If you have selected:

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

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

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

- Select **Complete**.

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

The screenshot shows the app interface for a client named Harry Boyer. The top navigation bar includes a back arrow, the client name, and icons for home, help, and a 'Connected' status. Below this are three main tabs: 'Client', 'Assessment', and 'Support Plan'. On the right, there are buttons for 'Upload', 'Quick notes', and 'More options'. The left sidebar lists navigation options: 'Client Profile', 'Contact Details', 'Support Network and Cohabitants', 'Wallet check' (highlighted), and 'Event summary and Approvals'. The main content area is titled 'Wallet check' and contains a message: 'Wallet check has been completed' with a green checkmark icon. A note above the message states: 'All fields marked with an asterisk (*) are required.'

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

This will not prevent you from completing an assessment.

12. Undertaking assessments

Needs assessors can use the App to:

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

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

For further guidance on completing and assessment, follow the steps outlined in My Aged Care – Assessor Portal User Guide 6- Completing an assessment

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

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

In the Card View, choose the client card. Select List View at the right hand side of the screen to change to the List view.

In the List view, choose the client's listing. Select Card View at the right hand side of the screen to change to the Card view.

CARD VIEW

Dashboard UAT SAH Automation Outlet Connected Elnaq Gibsone

Filters 36 assessments, sorted by Client Last Name

Lionel Legrose End of Life Urgent

GREENWAY, ACT, 2900

Aged Care ID: AC99310708

Assessment type: Support Plan Review

Assessment status: SPR in progress

Finalised Support Plan Review due by: 28/02/2026 (107 days overdue)

Jeff Lombok High priority

GREENWAY, ACT, 2900

Aged Care ID: AC41789421

Assessment type: Comprehensive Assessment

Assessment status: Assessment not started

Completed Triage due by: 18/06/2026 (3 days)

List view

Sync Referrals

New Assessment

Backup Assessments

January March High priority

ZILLMERE, QLD, 4034

Aged Care ID: AC94655388

Assessment type: Comprehensive Assessment

Assessment status: In progress

Completed Support Plan due by: 07/03/2026 (100 days overdue)

Ron McDonald Self referral Urgent services Medium priority

GARRAN, ACT, 2605

Aged Care ID: AC50967173

Assessment type: Home Support Assessment

Assessment status: Triage in progress

Completed Triage due by: 18/05/2026 (28 days overdue)

LIST VIEW

Dashboard UAT SAH Automation Outlet Connected Elnaq Gibsone

Filters 36 assessments, sorted by Client Last Name

Name	Aged Care ID	Priority	Assessment type	Assessment status	KPI
Lionel Legrose	AC99310708	Urgent	Support Plan Review	SPR in progress	28/02/2026 (107 days overdue) End of Life
Jeff Lombok	AC41789421	High	Comprehensive Assessment	Assessment not started	18/06/2026 (3 days)
January March	AC94655388	High	Comprehensive Assessment	In progress	07/03/2026 (100 days overdue)
Ron McDonald	AC50967173	Medium	Home Support Assessment	Triage in progress	18/05/2026 (28 days overdue) Self referral Urgent services

Card view

Sync Referrals

New Assessment

Backup Assessments

2. Select Start Assessment.

Jeff Lombok

Jeff Lombok, AC41789421, born 25 February 1957, 69 Years.

Select an option to see more information.

✓

Start Assessment

⚠

Refer urgent services

🗑

Remove from device

+

Flag End-of-Life Pathway

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

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

4. The **Assessment Details** page will display, and the assessment can be commenced from here. Mandatory fields are identifiable by red asterisks, and prior to completing mandatory information a red triangle will display in the top right-hand side of the box.

Once a mandatory question is answered, this triangle disappears.

This feature helps to identify whether all mandatory questions have been answered in each section.

At the bottom of each page, Select the toggle to acknowledge that you have reviewed the information on the page and confirm that it is correct.

Select **Next** to navigate to the next section of the assessment in the App.

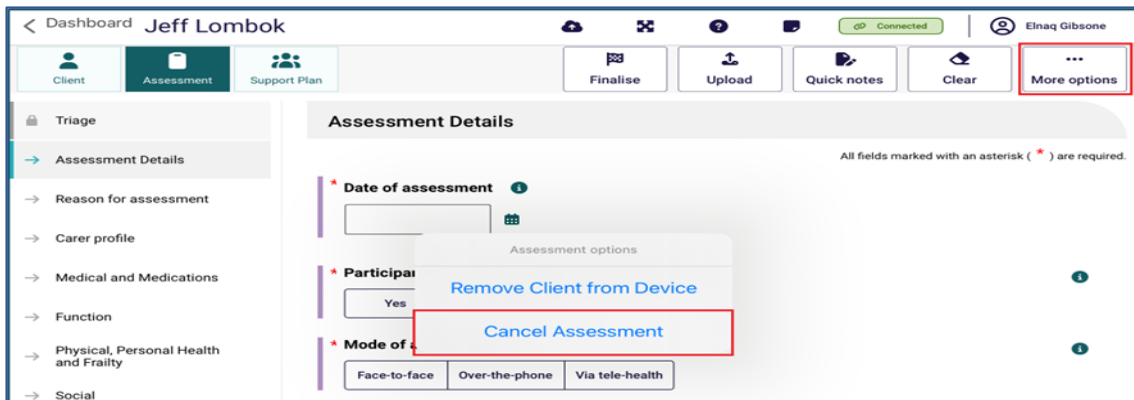
* I have reviewed the information on this page and I confirm that it is correct.

Back Next

! Cancelling an assessment

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

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



! Field text limits

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

Please provide additional details

Maximum 500 characters

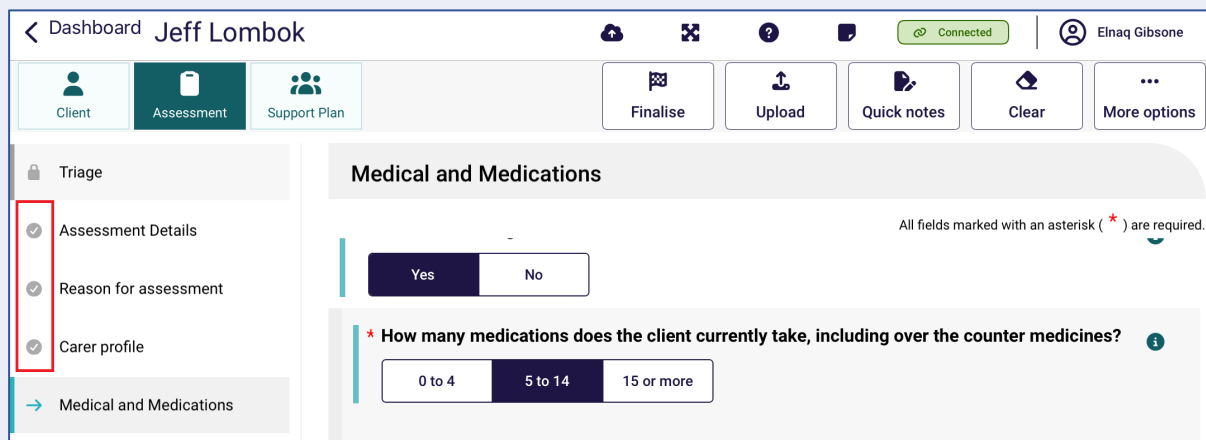
! Clearing information

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



5. Progress through the sections identified in the Assessment menu.

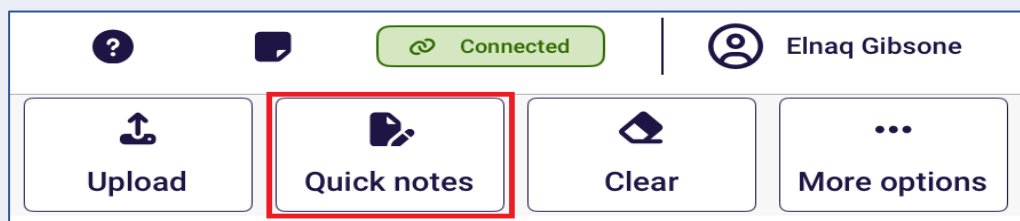
Similar to the My Aged Care assessor portal, a mandatory confirmation box must be completed at the bottom of each section. A tick will appear beside the relevant section in the **Assessment** menu when all mandatory questions for that section are complete.



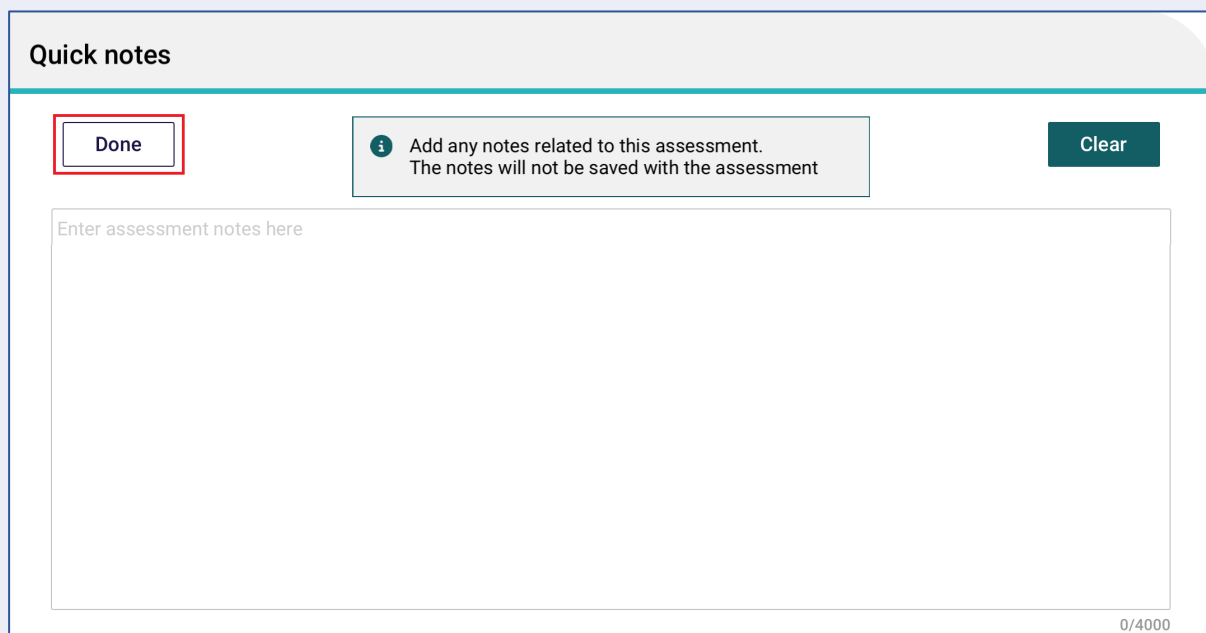
6. While progressing through the assessment, needs assessors may choose to use the **Quick notes** feature, which allows notes to be recorded on the App.

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

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



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



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

8. To add health conditions in the App, follow the same process as the assessor portal. Up to ten health conditions can be added in an assessment.
- Select **Yes** to 'Does the client have any health conditions?', then select **Add health condition**.

The screenshot shows the 'Medical and Medications' section of the app. At the top, there's a navigation bar with 'Client', 'Assessment', and 'Support Plan' tabs. Below that are buttons for 'Finalise', 'Clinical Supervisor', 'Upload', 'Quick notes', 'Clear', and 'More options'. The main content area has a sidebar on the left with options like 'Triage', 'Assessment Details', 'Reason for assessment', 'Carer profile', 'Medical and Medications', and 'Function'. The main area is titled 'Medical and Medications' and contains a question: '* Does the client have any health conditions?'. There are two buttons: 'Yes' (highlighted with a red box) and 'No health conditions present'. Below this is a section titled 'Health Conditions' with a yellow warning box that says 'Please add a Health Condition'. At the bottom right of this section is a button labeled 'Add health condition' (highlighted with a red box).

9. From the Health conditions page, you can then search by the condition name, category or ACAP code.
- Once you start typing a condition name, a list of possible health conditions appears.
- Choose an option.

The screenshot shows the 'Health Conditions' search page. At the top, there's a title 'Health Conditions'. Below that is a search bar with the text 'Asth'. To the right of the search bar is an information icon. Below the search bar is a list of conditions. The first one is '1004 Other diseases of upper respiratory tract (includes respiratory allergies (excluding allergic asthma), chronic rhinitis & sinusitis, chronic diseases of tonsils & adenoids) Diseases of the respiratory system'. The second one is '1005 Chronic lower respiratory diseases (includes emphysema, chronic obstructive airways disease (COAD), chronic obstructive pulmonary...'. At the bottom right, there are two buttons: 'Remove health condition' and 'Save and close'.

10. More information about the chosen health condition appears. Select the diagnosis status, and tick if it is a primary health condition.

Select **Save and Close** and close to add the health condition.

Health Conditions

*** Select a Health Condition type** ⓘ

Chronic lower respiratory diseases (includes emphysema, chronic obstr... ▼

*** Health Conditions Description**

1005:Chronic lower respiratory diseases (includes emphysema, chronic obstructive airways disease (COAD), chronic obstructive... 193 of 500

*** Diagnosis status** ⓘ

<input type="checkbox"/> Client reported
<input type="checkbox"/> GP confirmed
<input type="checkbox"/> Hospital confirmed
<input type="checkbox"/> Other health practitioner confirmed

Primary Health Condition ⓘ

Remove health condition Save and close

You will be taken back to the Medical and Medications page.

Select **Add health condition** to add another health condition, or you can **Edit** or **Delete** the health condition/s that's already entered.

Jeff Lombok

Client Assessment Support Plan Finalise Upload Quick notes Clear More options

Connected Elnaq Gibsons

Triage

Assessment Details Reason for assessment Carer profile Medical and Medications

Function Physical, Personal Health and Frailty Social Cognition Behaviour Psychological

Medical and Medications

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

*** Does the client have any health conditions?**

Yes No health conditions present

Health Conditions

1005 Chronic lower respiratory diseases (includes emphysema, chronic obstructive airways disease (COAD), chronic obstructive pulmonary disease (COPD), asthma) Primary

1005:Chronic lower respiratory diseases (includes emphysema, chronic obstructive airways disease (COAD), chronic obstructive pulmonary disease (COPD), asthma):Diseases of the respiratory system GP confirmed

Add health condition

Add as Other Consideration

11. In the IAT assessment, **validated assessment tools** and questions will trigger based on the information recorded by the needs assessor during the assessment.

These validated assessment tools are now integrated into the tool, and it will be listed automatically under the relevant section of the assessment that you are completing with the client.

The screenshot shows the IAT assessment interface for a client named Jeff Lombok. The top navigation bar includes a back arrow, the client name, and a 'Connected' status. Below this are tabs for 'Client', 'Assessment', and 'Support Plan'. Action buttons for 'Finalise', 'Upload', 'Quick notes', 'Clear', and 'More options' are visible. The left sidebar lists assessment categories: Triage, Assessment Details, Reason for assessment, Carer profile, Medical and Medications, Function, Physical, Personal Health and Frailty, Social (highlighted), Cognition, Behaviour, Psychological, and Home and Personal Safety. The main content area is titled 'Social' and contains a question: '* Do you ever feel lonely, down or socially isolated?'. The response options are 'No, not at all', 'Occasionally', 'Sometimes', 'Most of the time', and 'Not sure'. Below this is a checkbox for 'Add as Other Consideration'. A red box highlights the 'Duke Social Support Index - Social Interaction Subscale (DSSI_SI)' section, which contains two questions: 'Other than members of your family, how many persons in your local area do you feel you can depend on or feel very close to?' with options 'None', '1-2 people', and 'More than 2 people'; and 'How many times during the past week did you spend time with someone who does not live with you, that is, you went to see them or they came to visit you or you went out together?' with a table of options: 'None', 'Once', 'Twice', 'Three times', and 'Four times'. The version number 'Version: 12.1' is displayed at the bottom left.

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

12. Threshold questions are also used throughout IAT to trigger moving the assessment into clinical/comprehensive areas.

These questions are identified by a purple icon with text outlining the need for completion under your organisation's clinical governance.

For non-clinical needs assessors, these questions can only be completed with clinical attendance.

To proceed in answering these questions under supervision, non-clinical needs assessors must select the **Clinical Supervisor** button from the top banner.

← Matt Callaghan

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

Triage

→ Assessment Details

→ Reason for assessment

→ Carer profile

→ Medical and Medications

→ **Function**

→ Physical, Personal Health and Frailty

→ Social

→ Cognition

Function

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

* **Toileting – Bladder**

Continent (for over 7 days)

Occasional accident (max. once per 24 hours)

Incontinent, or catheterised and unable to manage

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

Yes No

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

* **Is the client able/willing to complete the Revised Urinary Incontinence Scale?**

Yes No

Non-clinical needs assessors must then confirm if they are completing the questions under clinical attendance and select the supervising assessor from the list.

Once completed, select **Confirm** to continue.

You will be re-directed back to the assessment when you can proceed to complete the assessment with clinical attendance.

Clinical declaration and supervisor details

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

Yes No

Select a supervising assessor for clinical assessment

Back **Confirm**

Done

Landry Little
Allen Jarvis
Holland Baldwin

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

During the assessment, there are reminders for assessors to consider **Assistive technology** and/or **Home modifications**.

At the end of certain IAT sections, there will be tickboxes available to select if you believe the client would benefit from funding for Assistive technology and/or Home modifications.

Once one or both are selected, the **Add as Other Consideration** will automatically be selected as well.

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

Any Assistive technology or Home modifications considerations that are selected in the IAT will be displayed as **AT consideration** or **HM consideration** respectively.

The screenshot shows the app interface for a client named Jeff Lombok. The top navigation bar includes a back arrow, the client name, and several utility icons. Below this is a secondary bar with 'Client', 'Assessment', and 'Support Plan' tabs, where 'Support Plan' is highlighted with a red box. To the right are buttons for 'Finalise', 'Upload', 'Quick notes', and 'More options'. The main content area is divided into a left sidebar and a right main panel. The sidebar lists navigation options: 'Assessment Summary', 'IAT Outcome and Classifications', 'Identified Needs' (highlighted with a red box), 'Client concerns and goals', 'Recommendations', 'Associated People', and 'Review'. The main panel is titled 'Identified Needs' and contains three sections: 'Functional Needs' (No functional needs found), 'Other Considerations' (Client from a culturally and linguistically diverse background. AT consideration - Medications, HM consideration - Function, HM consideration - Physical personal health and frailty), and 'Complexity Indicators' (Client has a memory problem or confusion that significantly limits self-care capacity, requires intensive supervision and/or frequent changes to support.). A note at the top right states 'All fields marked with an asterisk (*) are required.'

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

The screenshot shows the app interface for a client named Georgina Smith. The top navigation bar is similar to the previous screenshot. The secondary bar has 'Client', 'Assessment', and 'Support Plan' tabs, with 'Support Plan' highlighted. The main content area has a left sidebar and a right main panel. The sidebar lists navigation options: 'Assessment Summary', 'IAT Outcome and Classifications', 'Identified Needs', 'Client concerns and goals', 'Recommendations' (highlighted with a red box), 'Associated People', and 'Review'. The main panel is titled 'Recommendations' and features a '+ Add a recommendation' button. Below this are two recommendation cards: 'General Recommendation' (Obtain a smoke alarm) and 'Service Recommendation' (Domestic assistance - Laundry services). Each card shows 'No goals linked' and has icons for viewing and editing. A note at the top right states 'All fields marked with an asterisk (*) are required.'

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

The screenshot shows the app interface for a client named Jeff Lombok. The top navigation bar is the same as in the previous screenshots. The secondary bar has 'Client', 'Assessment', and 'Support Plan' tabs. The 'Finalise' button is highlighted with a red box. The main content area shows the 'Identified Needs' section, which is partially visible, including the note 'All fields marked with an asterisk (*) are required.'

16. After selecting **Finalise**, confirm that you have added any required goals to the support plan by selecting its tickbox.

Then, record the consent to refer services from the client, or the client with support person, or the supporter guardian (registered supporter), or that the consent was not given.

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

Finalise IAT

i You are about to finalise this assessment. Confirm that Jeff Lombok, born 25 February 1957, age 69, AC41789421 is the person you are conducting this assessment for. If the person details are incorrect, a privacy breach may occur.

Please confirm you have completed the clients' goals before you finalise the IAT. Once you finalise the IAT, the IAT outcome and any recommendation prompts will be generated.

Before you confirm, please take the following actions:

- Add any goals that you may have identified are required for the client.
- Review any pre-existing goals.

If you have identified there are no goals required for the client, you can confirm and finalise the IAT.

*** Confirm goals**

I have confirmed that any required goals are added to the Support Plan

Consent to service referrals

*** Consent obtained from:**

The client	The client with support person	Consent was not given
The supporter guardian		

i About consent ▶

i Capacity to give consent ▶

i When and how to seek consent ▶

i Consent script ▶

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

Then, select whether the consent was obtained from the client or the supporter guardian.

If consent was obtained from a supporter guardian, you will also be required to enter their first name before proceeding.

Select **Finalise** to continue.

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

Finalise IAT

Consent to share Support Plan with My Health Record (MHR)?

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

Yes No

* Consent obtained from?

Supporter Guardian Client

* Why was consent not provided?

Privacy concerns Do not wish to disclose Other

Comments

Maximum 150 characters

0 of 150

Back

Finalise

18. A pop-up will then display asking you to finalise the assessment.

Please note once you finalise the assessment it cannot be edited.

Select **Finalise** to continue.

Finalise IAT

Consent to share Support Plan with My Health Record (MHR)?

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

Yes No

* Consent obtained from?

Supporter Guardian Client

* Why was consent not provided?

Privacy concerns Do not wish to disclose

Finalise assessment

Warning: You are about to finalise this assessment.
An IAT recommendation will be generated.
Once finalised, you cannot edit this assessment.

Back

Finalise



13. Developing a support plan

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

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

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

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

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

1. To commence a support plan for a client who you are assessing, select the client card, and select **Support Plan** from the top left menu. The **Assessment summary** will display.

The Assessment summary will be pre-filled with information captured during the assessment.

Georgina Smith

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

→ Assessment Summary

→ IAT Outcome and Classifications

→ Identified Needs

→ Client concerns and goals

→ Recommendations

→ Associated People

→ Review

Assessment Summary

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

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

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

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

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

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

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

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

Flag as draft

1929 of 5000

Edit

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

The screenshot shows the 'Assessment Summary' page. On the left is a navigation menu with items: Assessment Summary, IAT Outcome and Classifications, Identified Needs, Client concerns and goals, Recommendations, Associated People, and Review. The main content area is titled 'Assessment Summary' and contains several paragraphs of text, including a note that all fields marked with an asterisk are required. At the bottom left of the main content area is a 'Flag as draft' toggle. At the bottom right is a dark blue 'Edit' button with a red border.

3. Select **Confirm Edit** at the pop up that appears.

Note that once you start editing the assessment summary, you will no longer be able to pre-populate information from the assessment.

You will then be able to Flag as draft by the toggle function.

This screenshot is similar to the previous one but includes a white confirmation dialog box in the center. The dialog box contains the following text: 'Once you edit the Assessment Summary, you will no longer be able to pre-populate information from the assessment. Select 'Confirm Edit' to continue. If you want to add additional information into the assessment for it to be pre-populated into the Assessment Summary, select 'Cancel' and return to the assessment.' At the bottom of the dialog are 'Cancel' and 'Confirm Edit' buttons. The 'Confirm Edit' button is highlighted with a red border. The 'Flag as draft' toggle at the bottom left of the main content area is also highlighted with a red border.

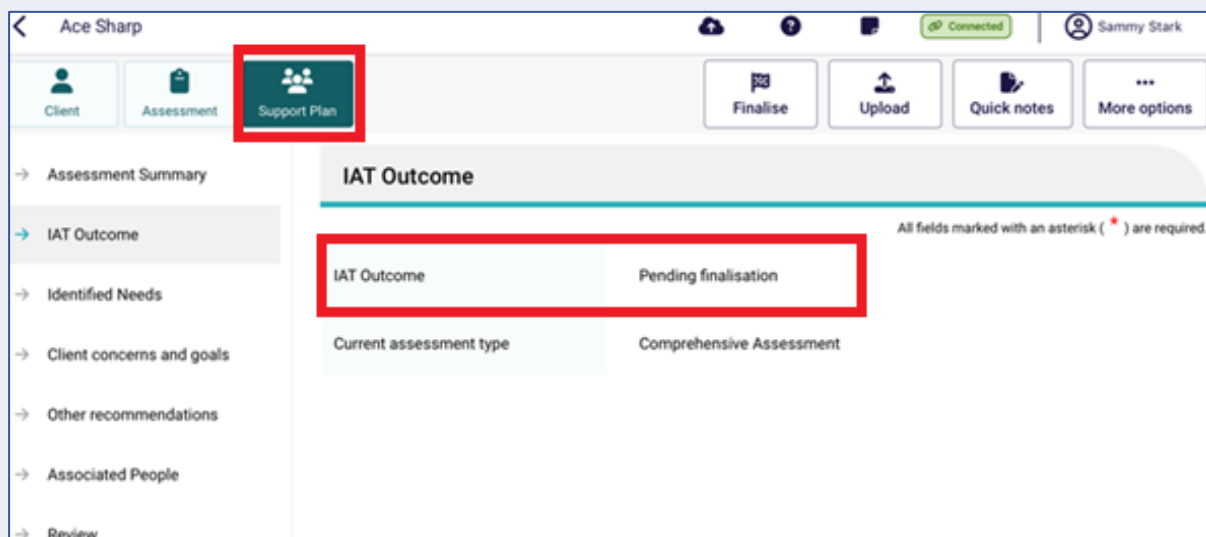
There will be a **D** icon next to the Assessment Summary menu, to remind users that the assessment summary is a draft and should be completed prior to uploading to the assessor portal.

14. IAT outcome and classifications

In the Support Plan Tab, IAT Outcome page, needs assessors can view a suggested support recommendation for the type of care the client may require.

The ongoing home support algorithm will draw on assessment responses and the client's current care approvals and recommend an Aged Care program or care pathway.

If the IAT assessment has not been finalised, then the IAT Outcome will display as **Pending finalisation**.



Once the IAT assessment has been finalised the IAT Outcome will display. Assessors will have the option to either **Accept** or [Override the IAT outcome](#).

! Legislation and Overriding IAT Outcomes

In line with legislation, you are not permitted to:

- recommend a different ongoing Home Support classification level.
- override 'Ineligible for CHSP/SaH' to any ongoing Home Support services.

You are permitted to recommend short-term pathways and Residential Care according to the rules of the [My Aged Care Assessment Manual](#).

Recommending ongoing Home Support services via Support at Home or CHSP

- Ensure the recommended classification aligns with the IAT outcome.
- If after an IAT review, the IAT outcome shows a lower classification than the client's current classification, ensure the recommended classification is equivalent to the client's existing classification.

Refer to the [My Aged Care Assessment Manual](#), [Assessor Portal User Guide 7](#) and [Assessor Portal User Guide 10](#) for further information.



In line with legislation, you are not permitted to override the IAT Outcome to recommend a different ongoing home support classification level (e.g., CHSP or SaH class 1-8) nor can you override the IAT Outcome of 'ineligible for CHSP/SaH' to recommend ongoing home support services. If your intent is to recommend ongoing home support services through Support at Home or CHSP, please ensure the recommended classification aligns with the IAT outcome. You can override the IAT outcome to recommend other care types, such as short-term pathways and residential care, in line with guidance provided in the Aged Care Assessment Manual.

Note: If through the IAT review process, the IAT outcome results in a lower classification than the client's current existing classification, please ensure the Recommended Classification is equivalent to the client's existing Classification level when recommending ongoing home support services through Support at Home or CHSP.

Sometimes, other buttons are available, such as **No Care Type under the Act**.

This option is used where, based on the assessment outcome, a person does not meet the eligibility requirements for any care program under the Act. In these cases, no care type is approved, the assessment outcome is recorded as **“No Care Approved,”** and the client receives a non-approval letter.

‘No Care Type under the Act’ can appear as an option for both Home Support Assessments and Comprehensive Assessments.

Jeff Lombok

Client Assessment Support Plan

Upload Quick notes More options

Assessment Summary

IAT Outcome and Classifications

Identified Needs

Client concerns and goals

Recommendations

Associated People

Review

IAT Outcome and Classifications

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

IAT Outcome

SaH Classification 7

Confirm the client's new Classification by Accepting or Overriding the IAT Outcome.

Accept Override No Care Type under the Act

Existing Classification No active classification

Current assessment type Comprehensive Assessment

Recommended Classification Pending decision

If the IAT system determines that the client may be suitable for Restorative Care Pathway via Support at Home, Assistive technology, and/or Home modifications, a corresponding message displays.

You can add these by overriding the IAT outcome.

Client Assessment Support Plan

Finalise Clinical supervisor Upload Quick notes Clear page information More options

Search by...

Assessment summary

IAT Outcome and classifications

Identified needs

Client concerns and goals

Recommendations

Seeking services

Associated people

Review

IAT Outcome and Classifications

IAT Outcome

The client may be suitable for Restorative Care Pathway delivered through Support at Home, this can be added by overriding the IAT outcome.

Please consider the identified needs captured in the other considerations section when making an AT or HM funding tier recommendation.

The client may be suitable for Assistive technology - Ongoing delivered through Support at Home.

SaH Classification 5

Confirm the client's new Classification by Accepting or Overriding the IAT Outcome.

Accept Override No Care Type under the Act

Existing Classification No active classification

Recommended Classification Pending decision

Current assessment type Comprehensive Assessment

Please consider the identified needs captured in the other considerations section when making an AT or HM funding tier recommendation.

The below image shows an example of an overridden IAT outcome.

It is stated in the Recommended Classification section.

There is also an Override Reason section, and an Override reason description section.

Comprehensive Assessment example

IAT Outcome and Classifications	
IAT Outcome	SaH Classification 4
Existing Classification	No active classification
Current assessment type	Comprehensive Assessment
Recommended Classification	SaH Restorative Care Pathway Short-term
Override reason	Does not want ongoing services
Override reason description	Reason goes here

Once a **Support at Home Classification, End-Of-Life Pathway** or **Restorative Care Pathway** is accepted, their associated service group recommendations will be pre-filled in the **Recommendations** page.

For Restorative Care Pathway, Assistive technology (Medium) and Home modifications (Medium) are also automatically added. For End-of-life Pathway, Assistive technology (Medium) is also automatically added.

The below image shows the Recommendations page of a client who has been assessed for the Restorative Care Pathway.

This page contains a list of pre-filled Restorative Care services, grouped under service types, for the assessor to view or edit.

For example, there are three services under the Domestic Assistance service type: general house cleaning, laundry services, and shopping assistance.

! For more information on the services and service types available refer to [Support at Home program | Australian Government Department of Health, Disability and Ageing](#).

You can select service/s under each service type available for the classification to **view** (eye icon) or **edit** (pencil icon).

Izzy Raeside

Client Assessment **Support Plan** Upload Quick notes More options

Assessment Summary
IAT Outcome and Classifications
Identified Needs
Client concerns and goals
Recommendations
Associated People
Review

Recommendations

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

+ Add a recommendation

Restorative Care

Allied health and therapy	Physiotherapy	No goals linked		
Care management	Home support care management	No goals linked		
	General house cleaning	No goals linked		
Domestic assistance	Laundry services	No goals linked		
	Shopping assistance	No goals linked		

1. On the **Editing [service name]** page, tick the required service/s, then enter the recommended service frequency and service intensity (eg. 2 hours per day). For some services, you can input an 'other' value.
2. You can also [link goals](#) here. Finally, select **Save**.

Editing Restorative Care services

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

Domestic assistance

General house cleaning Updated **+ 1 Goals linked**

Recommended Service Frequency **Recommended Service Intensity**

Laundry services Updated **+ No goals linked**

Recommended Service Frequency **Recommended Service Intensity** *** Recommended service intensity - Other (specify)** 15 of 100

Shopping assistance Removed

Cancel Save

Once the desired recommendations are selected, edited and saved, the **Recommendations page** re-appears, with only the services that you have added displayed.

! Assessors must first make a **Classification recommendation**—after finalising the **Integrated Assessment Tool (IAT)** before they can add **Recommendations** to the Support Plan. This ensures that all decisions are informed by the outcomes of the IAT, maintaining consistency and accuracy in the client's care planning process.

The Support Plan section will remain locked until a classification recommendation is recorded.

For more information refer to the [Adding concerns, goals and recommendations](#) section.

Jeff Lombok

Client Assessment Support Plan

Upload Quick notes More options

Assessment Summary

IAT Outcome and Classifications

Identified Needs

Client concerns and goals

Recommendations

Associated People

Review

IAT Outcome and Classifications

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

IAT Outcome

SaH Classification 7

Confirm the client's new Classification by Accepting or Overriding the IAT Outcome.

✓ Accept Override ✗ No Care Type under the Act

Existing Classification No active classification

Current assessment type Comprehensive Assessment

Recommended Classification Pending decision

14.1 Converting to Comprehensive Assessment

If required, home support assessments can be converted to a comprehensive assessment after the IAT assessment has been finalised.

If an assessment is triaged as a home support assessment and the following service/s are recommended, the assessment will then need to be converted to a comprehensive assessment under the supervision of a staff member who holds a clinical assessor role in the My Aged Care Assessor Portal.

- Residential care
- Support At Home classification
- Restorative Care Pathway
- End-of-Life Pathway.

In the App, a warning banner appears:

! You must convert the assesment type to comprehensive before choosing to retain or override this IAT outcome.

1. To convert, select the **More options** button followed by **Convert to Comprehensive Assessment**.

The screenshot shows the 'IAT Outcome and Classifications' page. At the top right, there are buttons for 'Upload', 'Quick notes', and 'More options' (highlighted with a red box). A dropdown menu is open from 'More options', showing options: 'Remove Client from Device', 'Convert to Comprehensive Assessment' (highlighted with a red box), 'Cancel Assessment', and 'Flag End-of-Life Pathway'. Below the menu, there is a warning message: 'You must convert this IAT to Comprehensive before choosing to accept or override'. The main content area shows 'IAT Outcome' and 'SaH Classification 2' with an 'Override' button. A table below shows 'Existing Classification' as 'No active classification' and 'Current assessment type' as 'Home Support Assessment'.

2. From the Convert to Compressive Assessment page, enter the reason or comments for converting the assessment. Please note the reason for change will be auto-populated to 'High level care needs'.
3. Put in your reason or comments, then Select **Confirm** to convert the assessment.

The screenshot shows the 'Convert to Comprehensive Assessment' confirmation page. It features a warning message: 'You are about to convert the assessment type from Home Support to Comprehensive for Georgina Smith. Assessments should only be converted if the client needs exceed the level of care than can be provided through Home Support Assessments (e.g. Home support service). Once the assessment has been converted to comprehensive assessment, you can recommend all aged care services. Please note it will not be possible to revert it back to a Home Support assessment. Are you sure you would like to proceed?'. Below this, there are two text input fields: '* Reason for change' (pre-filled with 'High level care needs') and '* Reason or comments' (pre-filled with 'Want to override IAT outcome', highlighted with a red box). At the bottom right, there are 'Cancel' and 'Confirm' buttons (the 'Confirm' button is highlighted with a red box).

The **IAT Outcome** tab will then display that the assessment has been converted to a Comprehensive Assessment.

The screenshot shows the 'IAT Outcome and Classifications' page after conversion. The 'Current assessment type' is now 'Comprehensive Assessment', highlighted with a red box. The 'Reason for change' is 'High level care needs' and the 'Change comments' is 'Want to override IAT outcome'. The 'SaH Classification 2' is 'No active classification' with 'Accept' and 'Override' buttons. The 'Assessment type changed by' is 'Africa Green' and the date is '23/5/2025'.

14.2 Editing or Overriding the Recommended Classification

Assessors can edit or override a system generated IAT Outcome if they have made a mistake or if they are recommending the following:

- Support at Home Restorative Care Pathway
- Support at Home End-of-Life Pathway
- Transition Care Program
- Permanent Residential Care (without ongoing in-home services)
- Residential Respite Care (without ongoing in-home services).

For the **SaH Restorative Care Pathway (RCP)**, this can apply to both initial assessments and reassessments, and to transitioned and non-transitioned clients.

If the system suggests that you can choose the Restorative Care Pathway, but you decide to not proceed with adding RCP as a recommendation, then you will be prompted to specify the reason why the RCP was not selected, and to add the reason for the RCP rejection.

Example of system generated prompt to choose the Restorative Care Pathway

IAT Outcome and Classifications	
IAT Outcome	<p>The client may be suitable for Restorative Care Pathway delivered through Support at Home, this can be added by overriding the IAT outcome.</p> <p>Please consider the identified needs captured in the other considerations section when making an AT or HM funding tier recommendation.</p> <p>The client may be suitable for Assistive technology - Ongoing delivered through Support at Home.</p> <p>SaH Classification 5</p> <p>Confirm the client's new Classification by Accepting or Overriding the IAT Outcome.</p>
	<p><input type="checkbox"/> Accept <input type="checkbox"/> Override <input type="radio"/> No Care Type under the Act</p>
Existing Classification	No active classification
Recommended Classification	Pending decision
Current assessment type	Comprehensive Assessment

Example of Accept (RCP) Outcome pop up

Accept Outcome

You are about to Accept the system generated decision. Would you like to proceed with this selection?

* Please specify the reason why SaH Restorative Care Pathway was not selected

Other

* RCP reject reason description

Override reason description

Maximum of 150 characters 0 of 150

Cancel Accept

Follow these steps to edit or override the IAT outcome:

1. Select the Edit button next to the IAT outcome, or the Override button, to edit the recommended classification. This can also be done during the support plan review stage.

Edit Classification button appears when viewing an accepted IAT outcome.

The screenshot shows the 'IAT Outcome and Classifications' page. The left sidebar contains navigation options: Assessment summary, IAT Outcome and Classifications (selected), Identified needs, Client concerns and goals, Recommendations, Associated people, and Review. The main content area displays the following information:

IAT Outcome	SaH Classification 2
Current assessment type	Comprehensive
Recommended Classification	SaH Classification 6
Override reason	Higher level service provision needs
Override reason description	Higher level service provision needs

An 'Edit Classification' button with a pencil icon is highlighted with a red box next to the Recommended Classification field.

Override button is available during the initial acceptance of an IAT outcome.

The screenshot shows the 'IAT Outcome and Classifications' page during the initial acceptance phase. The left sidebar is the same as in the previous screenshot. The main content area displays the following information:

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

Confirm the client's new Classification by Accepting or Overriding the IAT Outcome.

IAT Outcome	SaH Classification 2
Existing Classification	No active classification
Current assessment type	Comprehensive Assessment

Below the IAT Outcome field, there are two buttons: 'Accept' (with a checkmark icon) and 'Override' (with a pencil icon). The 'Override' button is highlighted with a red box.

2. In the next page, select the new recommended classification, override reason and the reason description, then select **Save**.

! The IAT will allow an ongoing Support at Home Classification to be overridden to a different ongoing classification level.

However, assessors must **not** undertake this action and delegates must not approve assessments where this occurs.

An ongoing SaH classification outcome cannot be overridden to an ongoing lower or higher SaH classification outcome (in line with section 81-10 of the Aged Care Rules).

3. A confirmation pop up appears. Select **Confirm** to acknowledge that some recommendations may be removed as a result of changing classification, and this will require your recommended services to be added again.

The Assessor will be unable to override from a SaH Classification to **SaH End of Life Pathway** if the client is not flagged as End-of-life and required documentation is not provided. In these cases, an applicable error message will be displayed.

The following screenshot shows an example of an error message shown when overriding is not possible.

Edit Recommended Classification

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

! To be eligible for the End-of-Life Pathway, client must be flagged as End-of-Life by using the button 'FLAG CLIENT AS END-OF-LIFE' and the valid documentation must be provided.

IAT Outcome	SaH Classification 2	Classification type	Ongoing
Recommended Classification	SaH Classification 7	Classification type	Ongoing

* New Recommended Classification

SaH End-of-Life Pathway

Classification type: ShortTerm

- The new recommendation will display in the Recommended Classifications section of the IAT Outcome and Classifications page.

← Gracen Kelly
Connected
Elnaq Gibsons

Client

Assessment

Support Plan

Upload

Quick notes

More options

Assessment Summary

→ IAT Outcome and Classifications

→ Identified Needs

→ Client concerns and goals

→ Recommendations

→ Associated People

→ Review

IAT Outcome and Classifications

All fields marked with an asterisk (*) are required

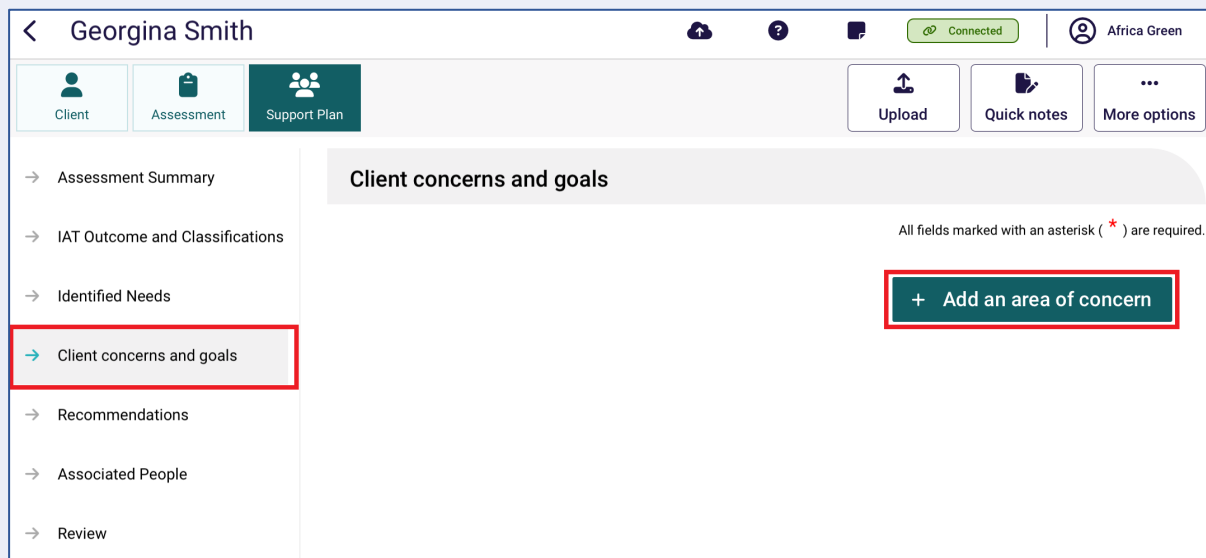
IAT Outcome	SaH Classification 4
Existing Classification	No active classification
Current assessment type	Comprehensive Assessment
Recommended Classification	SaH Restorative Care Pathway Short-term Edit Classification
Override reason	Does not want ongoing services
Override reason description	Reason goes here



15. Adding concerns, goals and recommendations

When developing a client's support plan in the App, Areas of Concern and Goals, and Recommendations can be added in the **Concerns and goals** and **Recommendations** section of the Support Plan.

1. To add an area of concern, select **+ Add an area of concern**.

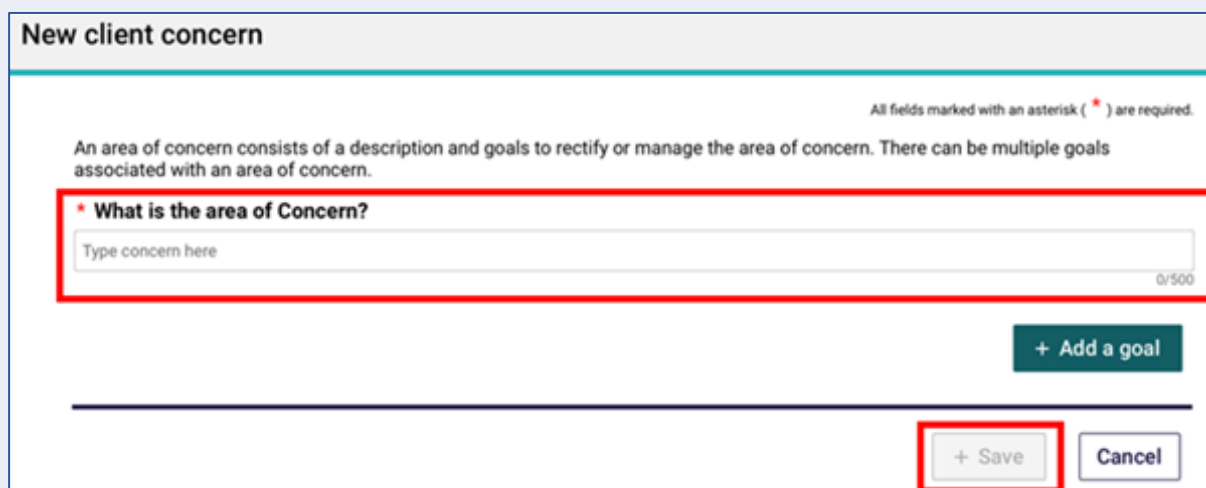


The screenshot shows the 'Client concerns and goals' section of the app. The top navigation bar includes a back arrow, the client name 'Georgina Smith', and icons for upload, help, and a 'Connected' status. Below the navigation bar are tabs for 'Client', 'Assessment', and 'Support Plan'. The 'Support Plan' tab is active, and a sidebar menu on the left lists various sections: 'Assessment Summary', 'IAT Outcome and Classifications', 'Identified Needs', 'Client concerns and goals' (highlighted with a red box), 'Recommendations', 'Associated People', and 'Review'. The main content area is titled 'Client concerns and goals' and contains a red-bordered button labeled '+ Add an area of concern'. A note at the top right states 'All fields marked with an asterisk (*) are required.'

2. Enter in **What is the area of concern** and click **+Save**.

You can add a goal at this stage by selecting the '+ Add a goal' button (refer to Steps 4 and 5), or during editing later on.

Please note you will only be able to save the concern once all mandatory information has been entered.



The screenshot shows the 'New client concern' form. The title is 'New client concern'. Below the title is a note: 'All fields marked with an asterisk (*) are required.' The main text reads: 'An area of concern consists of a description and goals to rectify or manage the area of concern. There can be multiple goals associated with an area of concern.' The form contains a red-bordered input field with the label '* What is the area of Concern?' and the placeholder text 'Type concern here'. Below the input field is a red-bordered button labeled '+ Add a goal'. At the bottom right of the form are two buttons: '+ Save' (highlighted with a red box) and 'Cancel'.

Select **Edit** to update or delete the area of concern or change the order of areas of concern using the arrow buttons (▲▼) where you have added multiple concerns.

Select **X** to delete the concern.

3. To add a goal to a recommendation, select **+ Add a goal** from the relevant area of concern and then select **+ Save**.

4. At the **Adding A Goal** page, enter what the goal is along with other key information such as what domain the goal relates to, the client's current strengths and abilities in relation to the goal and their motivation to achieve it.

At the **Recommendations** section of the page, you can select **+ Add A Recommendation**, or If the client already had recommended classifications (from the IAT Outcome and Classifications page), then these classifications will be automatically filled out, ready to be viewed (eye icon) or edited (pencil icon).

Once completed select **+ Save**.

Adding a goal

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

What is the area of concern?
Feeling lonely after husband passed away

*** What is the client's goal?**
Make 3 new friends this year 28 of 500

Most relevant domain that goal area relates to?

<input type="checkbox"/> Physical function	<input type="checkbox"/> Cognitive function
<input checked="" type="checkbox"/> Social support	<input type="checkbox"/> General health
<input type="checkbox"/> Personal health	<input type="checkbox"/> Home and personal safety
<input type="checkbox"/> Other	

*** What are the client's current strengths and abilities in relation to this goal?**
Can attend community center activities

*** What are the clients current areas of difficulty or activities where the client needs support in order to achieve this goal?**
No transport 12 of 500

What support does the client's carer provide to achieve this goal?
Gives lifts sometimes 21 of 500

*** What is the focus of the goal for the client?**

<input checked="" type="checkbox"/> To regain a function (e.g. can be physical, cognitive or social)	<input type="checkbox"/> To compensate for a declining function (e.g. can be physical, cognitive or social)
<input type="checkbox"/> To receive care for a lost or declining function (e.g. can be physical, cognitive or social)	

*** Motivation to achieve**
How important is it to the client to achieve this goal?
Scale of 1 (not that important) to 10 (extremely important)

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

*** Goal status**

In Progress	Achieved	No Longer Relevant
-------------	----------	--------------------

Recommendations









+ Add a recommendation

Back Delete Save

Adding a goal

Recommendations

- Assistive technology
- Home modifications
- Home Support (End-of-Life)
- Home Support

Back Delete Save

Recommendations can also be added after the completion of the **Areas of Concern** and **Goals** in the **Recommendations** section.

Client Assessment Support Plan

Upload Quick notes More options





- Assessment Summary
- IAT Outcome and Classifications
- Identified Needs
- Client concerns and goals
- Recommendations
- Associated People
- Review

Recommendations

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

+ Add a recommendation

Restorative Care

Allied health and therapy	Physiotherapy	No goals linked	 
Care management	Home support care management	No goals linked	 

- When viewing the **Recommendations** page, assessors can view the *latest recommended Ongoing classifications*, even if the client has multiple active existing classifications within the same category. This ensures assessors have access to the most current and relevant information about the client's service needs and priority status, supporting accurate and timely decision-making for Support at Home aged care services.

Additionally, If the client was approved for a Restorative Care Pathway classification, after a Support at Home classification is approved, assessors can view both the RCP and the SaH classifications,

Assistive Technology

<p>Ongoing - Equipment and products Specified Needs - Continence Products</p>	<p>Self-care products</p> <p>Mobility products</p> <p>Managing body functions</p> <p>Domestic life products</p> <p>Communication and information management products</p> <p>Assistive technology prescription and clinical support</p>	<p>Goals Linked</p> <p>Goals Linked</p> <p>Goals Linked</p> <p>Goals Linked</p> <p>Goals Linked</p> <p>Goals Linked</p>
<p>Short-term - Equipment and products AT Medium</p>	<p>Self-care products</p> <p>Mobility products</p> <p>Managing body functions</p> <p>Domestic life products</p> <p>Communication and information management products</p> <p>Assistive technology prescription and clinical support</p>	<p>Goals Linked</p> <p>Goals Linked</p> <p>Goals Linked</p> <p>Goals Linked</p> <p>Goals Linked</p> <p>Goals Linked</p>

- The corresponding recommendations available for each assessment type will display for the client in the **Recommendations** section. Recommendations that cannot be added (generally due to other recommendations that have been added) will be indicated in light grey text and any links will become inactive.

Home Support assessment:

Recommendation

Select a recommendation type

<p>General Recommendation Recommend →</p>	<p>Service Recommendation Recommend →</p>
<p>Long Term Living Arrangement Recommend →</p>	<p>Periods of Linking Support Recommend →</p>
<p>Periods of Reablement Recommend →</p>	<p>Recommendation for a Comprehensive Assessment Recommend →</p>

Back

Comprehensive assessment:

Recommendation

Select a recommendation type

General Recommendation Recommend →	Service Recommendation Recommend -
Care Type under the Act Recommend →	Home modifications Recommend -
Assistive technology Recommend →	Long Term Living Arrangement Recommend -
Periods of Linking Support Recommend →	Periods of Reablement Recommend -

Back

7. For some pathways, the recommendations will be pre-filled for the assessor to review and/or edit if necessary.

Below is an example screenshot of services available under the Restorative Care Pathway:

The screenshot shows the 'Recommendations' section for the Restorative Care Pathway. A sidebar on the left lists navigation options: Assessment Summary, IAT Outcome and Classifications, Identified Needs, Client concerns and goals, Recommendations (selected), Associated People, and Review. The top navigation bar includes 'Client', 'Assessment', and 'Support Plan' tabs, along with 'Upload', 'Quick notes', and 'More options' buttons. The main content area displays a table of services and their goal-linking status.

Restorative Care Pathway		
Domestic assistance	General house cleaning	No goals linked
	Laundry services	No goals linked
	Shopping assistance	No goals linked
Home adjustments	Home modification products	No goals linked
	Home modifications prescription and clinical support	Goals linked
Home maintenance and repairs	Assistance with home maintenance and repairs	No goals linked
	Expenses for home maintenance and repairs	No goals linked
	Gardening	No goals linked
Home or community general respite	Community and centre-based respite	No goals linked
	Flexible respite	No goals linked
Meals	Meal delivery	No goals linked
	Meal preparation	No goals linked

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

+ Add a recommendation

8. When available, add any service recommendations or care types under the Act. Similar to the assessor portal, [goals can be linked to some recommendations](#).

When finished, don't forget to select **Save** at the bottom of the recommendation page.

! If a client is under the aged of 65, several additional entry fields will appear to document their exceptional circumstances.

! If it is determined that a client has a high priority for a Support at Home service, you are required to answer all mandatory questions and provide your reason or comments using the available comment field.

← Connected Sheldon Cooper

Adding a Service Recommendation

Fields marked with an * are mandatory

* Service type

* Services
 Hydrotherapy Social Work
 Other Allied Health and Therapy services

* Priority

* Recommended service intensity i

* Recommended service frequency i

0/3

* Recommend a start date

* Recommend a review date

* Recommend an end date

* Responsibility to action
 Assessor Client
 Other

Comments

9. Once you have made all your recommendations, you will be able to view these in the **Recommendations** section.

The **Recommendations** section will display all recommendations made during the development of the Support Plan, where the **Client concerns and goals** will only display recommendations linked to goals.

The screenshot shows the 'Recommendations' section for a client named Georgina Smith. The 'Support Plan' tab is active. The left sidebar lists various sections, with 'Recommendations' highlighted. The main content area shows two recommendations: 'Obtain a smoke alarm' and 'Domestic assistance - Laundry services'. Each recommendation has a 'No goals linked' status and icons for viewing and editing. A '+ Add a recommendation' button is located at the top right of the recommendations list. A note states: 'All fields marked with an asterisk (*) are required.'

15.1 Recommendation Types

There are 8 recommendation types available from the App. Not all will be available depending on the client's assessment outcome.

If **CHSP**, **Services under the NATSIFACP** (National Aboriginal and Torres Strait Islander Flexible Aged Care Program), or **Services Under the MPSP** (Multi-Purpose Service Program) are recommended, then the assessor will not be able to choose No Care Approval or No Change to Existing Care Approvals. These two selections will not be displayed.

If **No Care Type under the Act**, **No Change to Existing Care Approval**, or **No Care Approval** is recommended, then the assessor will not be able to add any service recommendations. The 'Add A Recommendation' button will be disabled.

! From July 2026, all clients receiving CHSP services must have a CHSP classification. Assessors can add CHSP classifications for delegate approval during the client's assessment, reassessment, or Support Plan Review.

This table lists the recommendation types:

Recommendation Type	Choices available
General Recommendation	Free choice
Service Recommendation	Allied health and therapy Case Management Client care coordination Community cottage respite Domestic assistance Equipment and products Hoarding and squalor assistance Home adjustments Home maintenance and repairs Home or community general respite Meals Nursing Care Personal Care Services under the MPSP Services under the NATSIFACP Social support and community engagement Specialised support services Therapeutic services for independent living Transport
Care Type under the Act	Residential Permanent Residential Respite Care Transition Care
No Care Type under the Act* No Change to Existing Care Approval* No Care Approval*	*If these recommendations were made, then the assessor will not be able to add any service recommendations. The 'Add A Recommendation' button will be disabled.
Home modifications	Home adjustments (Service available according to Short-term or Ongoing Classification, and Low, Medium or High Tier)
Assistive technology	Equipment and Products (Service available according to Short-term or Ongoing Classification, and Low, Medium or High Tier)
Long Term Living Arrangement	Hospital Independent living within a retirement village Other community Other institutional Care Private residence Residential aged care service Supported community accommodation
Periods of Linking Support	N/A
Periods of Reablement	N/A

15.2 Support At Home Service Recommendations

The Support At Home Program offers services in three service groups: Assistive technology, Home modification, and Home Support.

If the client has a Support At Home (SaH) classification in their IAT Outcome and Classifications page, then all available Support At Home services that satisfies the client's classification will appear in the Recommendations page (except for [Assistive technology](#) and [Home modifications](#) which are added separately)

This table lists the Support At Home services:

Support At Home service type	Support At Home service
Care management	Home support care management
Domestic assistance	General house cleaning Laundry services Shopping assistance
Home maintenance and repairs	Assistance with home maintenance and repairs Expenses for home maintenance and repairs Gardening
Home or community general respite	Community and centre-based respite Flexible Respite
Meals	Meal delivery Meal preparation
Nursing care	Enrolled nurse clinical care Nursing assistance clinical care Nursing care consumables Registered nurse clinical care
Nutrition	Nutrition supports
Personal care	Assistance with self-administration of medications Assistance with self-care and activities of daily living Continence management (non-clinical)
Social support and community engagement	Accompanied activities Assistance to maintain personal affairs Cultural support Digital education and support Expenses to maintain personal affairs Group social support Individual social support
Transport	Direct transport Indirect transport

The below image shows some Home Support recommendations in the Recommendations page. Select the **View** (eye) button next to any one of these services, to view all services. Select the **Edit** (pencil) button next to any one of these services, to edit any available service.

The screenshot shows the 'Recommendations' page with a sidebar on the left containing navigation options like 'Assessment Summary', 'IAT Outcome and Classifications', 'Identified Needs', 'Client concerns and goals', 'Recommendations', 'Seeking services', 'Associated People', and 'Review'. The main content area is titled 'Recommendations' and includes a '+ Add a recommendation' button. Below this is a section for 'Home Support' with a warning message: 'Confirm the Home Support service frequency and intensity prior to submitting for delegate approval.' A table lists various services with their categories and goal status. A red box highlights the 'View' and 'Edit' buttons for the following services:

Category	Service	Goals	View/Edit
Care management	Home support care management	No goals linked	View, Edit
Domestic assistance	General house cleaning	No goals linked	View, Edit
	Laundry services	No goals linked	
	Shopping assistance	No goals linked	
Home maintenance and repairs	Assistance with home maintenance and repairs	No goals linked	View, Edit
	Expenses for home maintenance and repairs	No goals linked	
	Gardening	No goals linked	
Home or community general respite	Community and centre-based respite	No goals linked	View, Edit
	Flexible respite	No goals linked	

To successfully submit the Home Support recommendation for delegate approval, each service that the client will use will need to be fully completed, including service frequency and intensity.

1. To input service frequency and intensity, select any **Edit** button to open the **Editing Home Support Services** page.

The 'Editing Home Support services' page displays a section titled 'Therapeutic services for independent living'. It contains a list of services, each with a checkbox:

- Art therapy
- Remedial massage
- Diversional therapy
- Chiropractics
- Acupuncture

At the bottom of the page, there are two buttons: 'Cancel' and 'Save'.

2. Scroll down to the desired service, and go to **Recommended Service Intensity** and select a suitable value from the drop down menu provided, then select **Done**.

Editing Home Support services

All fields marked with an asterisk (*) are required

Meals

Meal delivery Added + No goals linked

Recommended Service Frequency

Recommended Service Intensity

Meal preparation Added + No goals linked

Recommended Service Frequency

Recommended Service Intensity

Done

Time(s) per hour

Time(s) per day

Days per month

Time(s) per year

Hours per day

The available service intensities are:

- Time(s) per hour
- Time(s) per day
- Days per week
- Time(s) per year
- Hours per day
- Hours per week
- Hour(s) per year.

3. Then, input an suitable number in the **Recommended Service Frequency** section.

For example, if the Recommended Service Intensity is Days per week, then the Recommended Service Frequency can only be a number from 1 to 7.

Once all values are properly entered, the red vertical line against each service will disappear, leaving a grey vertical line instead.

Recommended Service Frequency

Recommended Service Intensity

- If you have a non-standard service intensity, Select **Other – Specify** in the **Recommended Service Intensity** section.

Then, enter the service intensity in the **Recommended service intensity – Other (specify)** section that will appear on the right of the screen. Finally, enter the **Recommended service frequency**.

Editing Home Support services

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

Meal delivery Added + No goals linked

Recommended Service Frequency <input type="text" value="5"/>	Recommended Service Intensity <input type="text" value="Days per week"/>
--	--

Meal preparation Added + No goals linked

Recommended Service Frequency <input type="text"/>	Recommended Service Intensity <input type="text" value="Other - Specify"/>	* Recommended service intensity - Other (specify) <input type="text"/>
--	--	--

Done

Hours per week

Hours per month

Hour(s) per year

Other - Specify

Adding an Assistive technology (AT) recommendation

When an Assistive technology recommendation is approved, it is also known as a Support At Home AT Classification.

Please note that Assistance dogs are classified under the Ongoing classification type of assistive technology. It is known as ‘Specified Needs – Assistance Dogs’.

Follow these steps to add an AT recommendation:

- Go to the Support Plan tab, then the Recommendations page. Select **+ Add A Recommendation**.

Client

Assessment

Support Plan

Upload

Quick notes

More option:

- Assessment Summary
- IAT Outcome and Classifications
- Identified Needs

Recommendations

All fields marked with an asterisk (*) are require

+ Add a recommendation

2. Select **Assistive Technology** from the list of recommendation types.

Recommendation	
Select a recommendation type	
General Recommendation Recommend →	Service Recommendation Recommend -
Care Type under the Act Recommend →	Home modifications Recommend -
Assistive technology Recommend →	Long Term Living Arrangement Recommend -
Periods of Linking Support Recommend →	Periods of Reablement Recommend -

3. The **Adding Assistive Technology service** page appears.

Select the **Classification Type** (Ongoing or Short-term) from the drop down menu that appears.

If the classification type is Short-term, select the technology tier (AT Low, AT Medium, or AT High) from the drop-down list. If it is Ongoing, assistance dogs is available under the Specified Needs section. An example of each type is displayed below.

A number of services associated with the recommendation will be able for you to choose or delete. These services appear based on your answer and the outcome of your client's assessment, such as tier, specified needs, and service type.

Select service/s using the tickbox/es. At this stage you can also [link goals to each service](#) by selecting the 'No goals linked' button.

AT Short Term Classification Example

← ? Connected Sheldon Cooper

Adding Assistive Technology service

Fields marked with an * are mandatory

* Classification type
Short-term

* Assistive Technology Tier
AT Medium

* Service type
Equipment and Products

* Services

<input checked="" type="checkbox"/> Self-care products	No goals linked
<input checked="" type="checkbox"/> Mobility products	No goals linked
<input checked="" type="checkbox"/> Managing body functions	No goals linked
<input checked="" type="checkbox"/> Domestic life products	No goals linked
<input checked="" type="checkbox"/> Communication and Information management products	No goals linked

Cancel Delete Save

Adding Assistive technology service

All fields marked with an asterisk (*) are required

* Classification type
Ongoing

Specified needs
Specified needs - Assistance Dogs

Service type
Equipment and products

Services

<input checked="" type="checkbox"/> Assistive technology prescription and clinical support	+ No goals linked
<input checked="" type="checkbox"/> Communication and information management products	+ No goals linked
<input checked="" type="checkbox"/> Managing body functions	+ No goals linked

Cancel Save

4. Select **Save** to return to the **IAT Outcome and Classification** page.

Your service/s will be added to the Recommendations tab under the Assistive technology section.

You can view the services in more detail using the View (eye) icon, or edit the services using the Pencil icon.

Client Assessment Support Plan Upload Quick notes More options

Assessment Summary
→ IAT Outcome and Classifications
→ Identified Needs
→ Client concerns and goals
→ Recommendations
⚠ Seeking services
→ Associated People
→ Review

Recommendations

All fields marked with an asterisk (*) are required

+ Add a recommendation

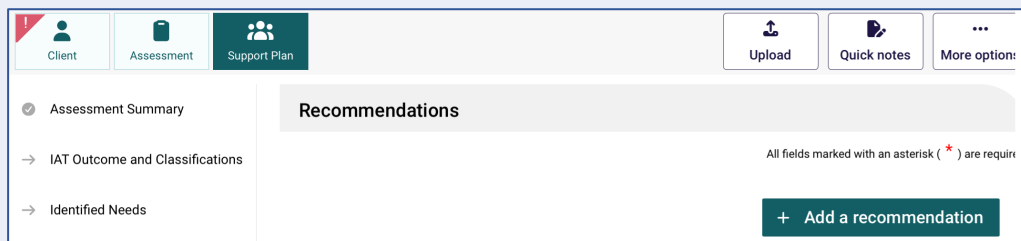
Assistive technology		
Short-term - Equipment and products AT Low	Assistive technology prescription and clinical support	No goals linked
	Communication and information management products	No goals linked
	Domestic life products	No goals linked
	Managing body functions	No goals linked
	Mobility products	No goals linked
	Self-care products	No goals linked

Adding a Home modifications (HM) recommendation

When a Home modifications recommendation is approved, it is also known as a Support At Home HM Classification.

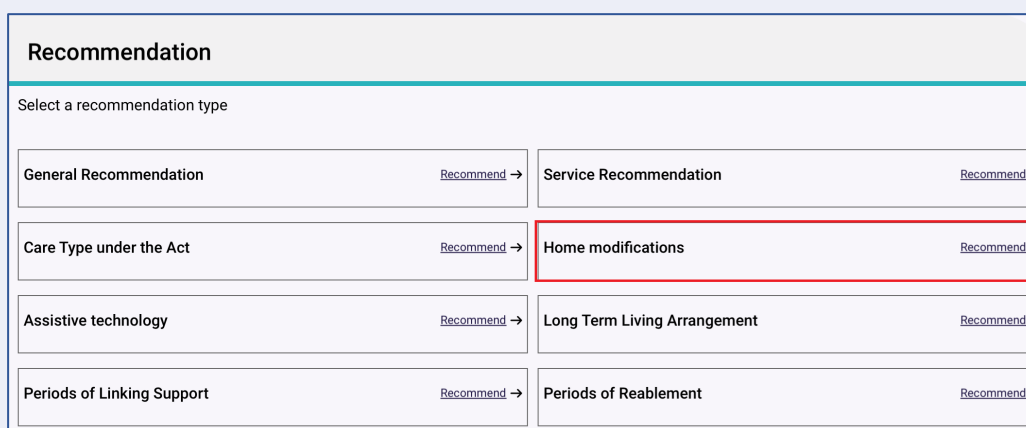
Follow these steps to add a HM recommendation:

1. Go to the Support Plan tab, then the Recommendations page. Select **+ Add A Recommendation**.



The screenshot shows the 'Support Plan' tab selected in the top navigation bar. Below the navigation bar, there are three tabs: 'Client', 'Assessment', and 'Support Plan'. The 'Support Plan' tab is active. On the right side, there are three buttons: 'Upload', 'Quick notes', and 'More options'. The main content area is titled 'Recommendations' and contains a sidebar with three items: 'Assessment Summary', 'IAT Outcome and Classifications', and 'Identified Needs'. A green button labeled '+ Add a recommendation' is located at the bottom right of the main content area. A note at the bottom right of the main content area states: 'All fields marked with an asterisk (*) are required'.

2. Select **Home modifications** from the list of recommendation types.

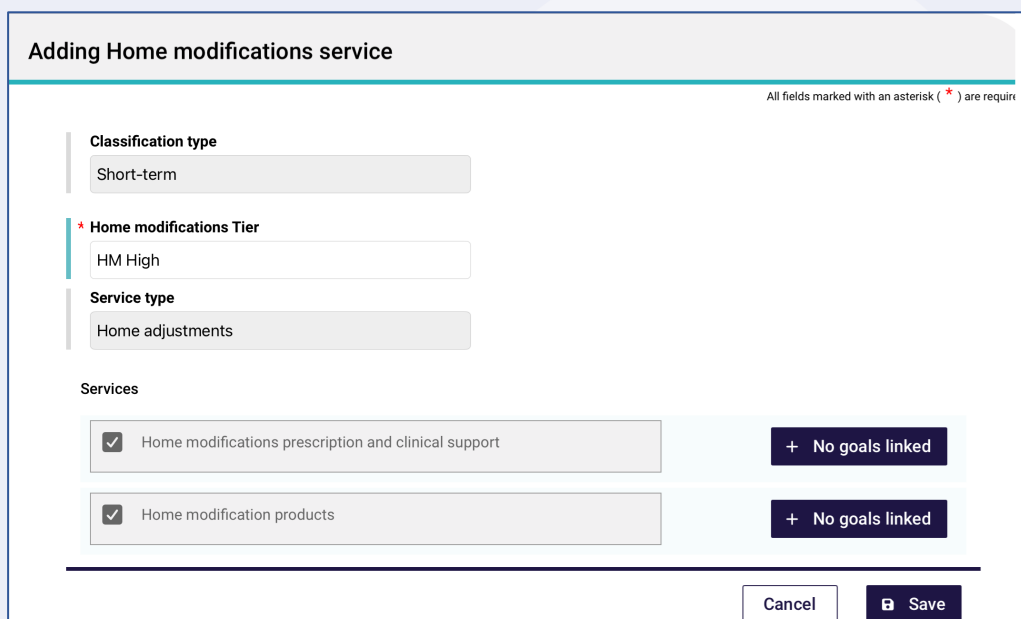


The screenshot shows the 'Recommendation' selection page. The title is 'Recommendation'. Below the title, it says 'Select a recommendation type'. There are eight recommendation types listed in a grid, each with a 'Recommend' button: 'General Recommendation', 'Service Recommendation', 'Care Type under the Act', 'Home modifications' (highlighted with a red border), 'Assistive technology', 'Long Term Living Arrangement', 'Periods of Linking Support', and 'Periods of Reablement'.

3. The **Adding Home modifications service** page appears.

The **Classification Type** (Ongoing or Short-term) is pre-filled.

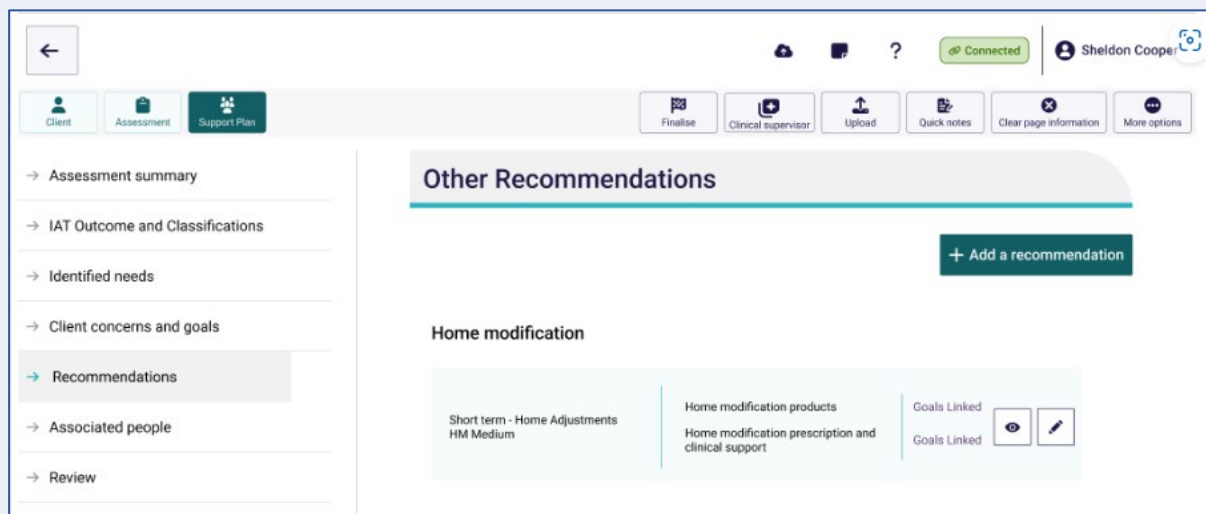
Select the **Home modifications Tier** (HM Low, HM Medium, or HM High) from the drop down menu that appears. Select service/s using the tickbox/es. At this stage you can also [link goals to each service](#) by selecting the 'No goals linked' button.



The screenshot shows the 'Adding Home modifications service' page. The title is 'Adding Home modifications service'. Below the title, it says 'All fields marked with an asterisk (*) are required'. The page contains several sections: 'Classification type' with a dropdown menu set to 'Short-term'; '* Home modifications Tier' with a dropdown menu set to 'HM High'; 'Service type' with a dropdown menu set to 'Home adjustments'; and 'Services' with two checkboxes checked: 'Home modifications prescription and clinical support' and 'Home modification products'. Each checked service has a '+ No goals linked' button next to it. At the bottom of the page, there are two buttons: 'Cancel' and 'Save'.

4. Select **Save** to return to the **IAT Outcome and Classification** page.

Your service/s will be added to the Recommendations tab under the **Home modification** section. You can view the services in more detail using the View (eye) icon, or edit the services using the Pencil icon.

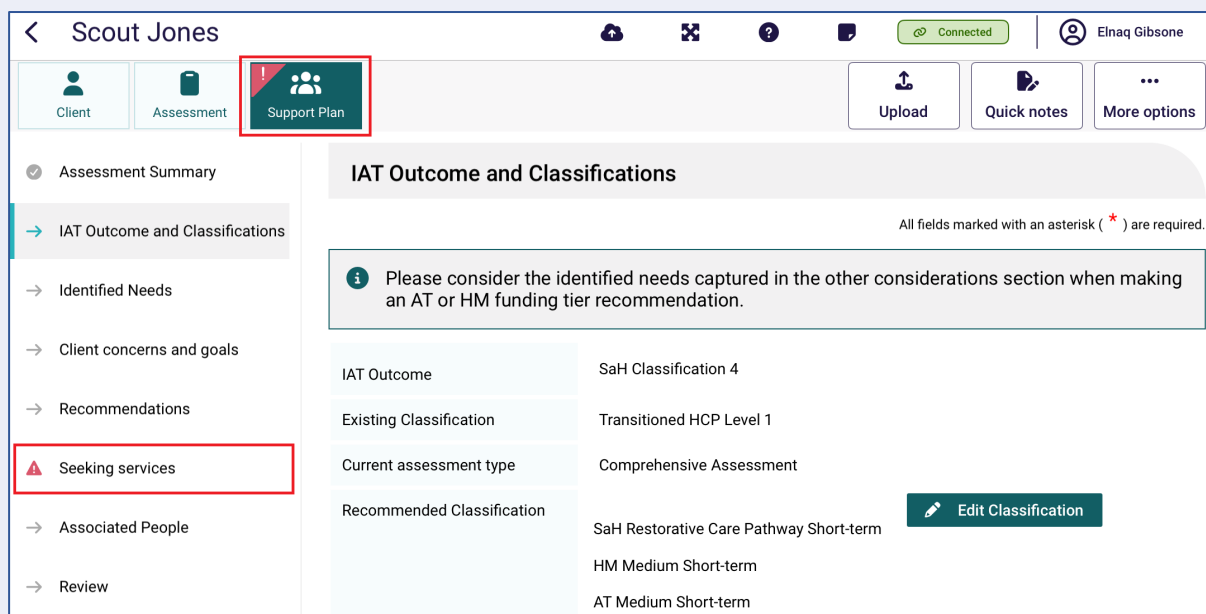


15.3 Adding Seeking Services Preferences

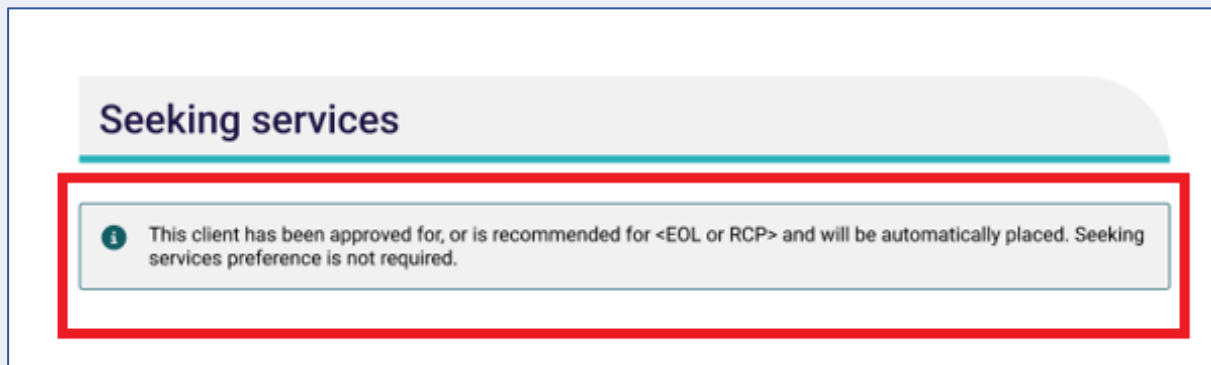
Assessors can use the App to indicate whether their client are seeking Home Support services and/or Home modification and/or Assistive technology services through the Support At Home program.

This function is for clients recommended or approved for Support at Home (SaH), Assistive Technology (AT), and Home Modifications (HM) only.

If an IAT assessment results in a SaH classification or outcome, the app will automatically add a Warning icon to the Seeking Services section and the Support Plan section to remind assessors to indicate whether the client is seeking Home support services. Once you enter the Seeking Services page, the warning icon/s will disappear.

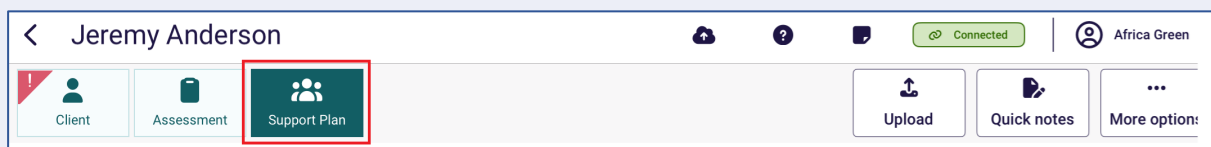


If the client is approved or recommended for the End of Life Pathway or the Restorative Care Pathway, a message will display indicating that the client will be automatically placed and no Seeking Services preference is required.



Follow these steps to add seeking services:

1. Open the Client's assessment record and navigate to the support plan section.



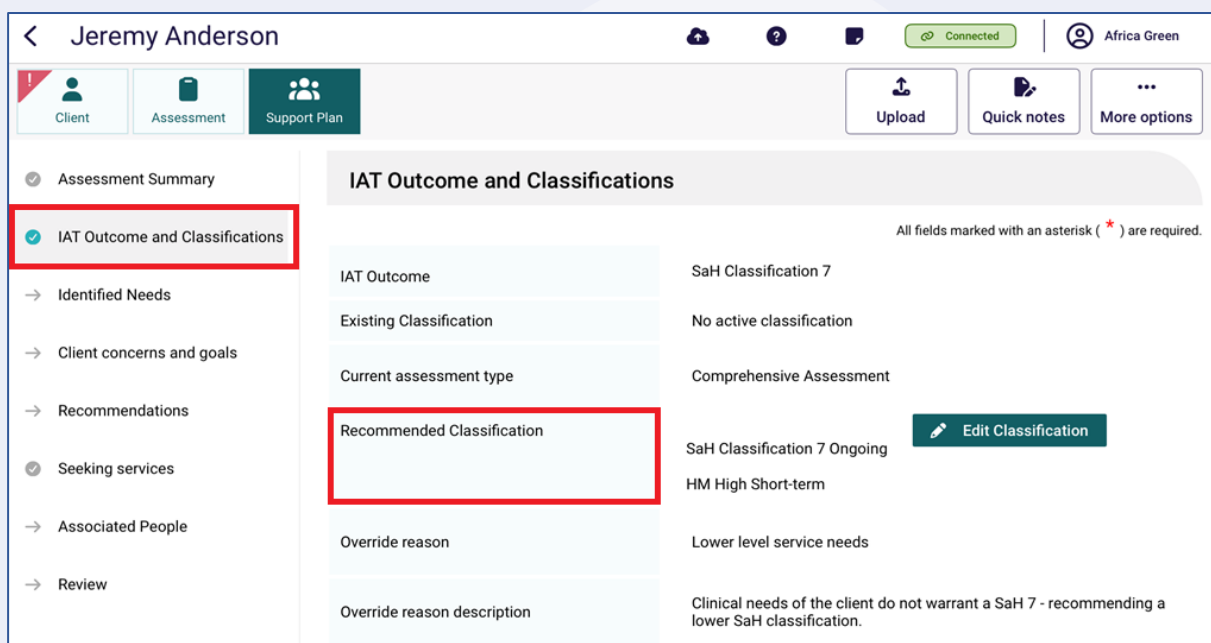
2. Check if the client is eligible to add seeking services, by going to the **IAT Outcome and Classifications** page.

Seeking Services preferences will only be available if the client has:

- An **Approved Classification** from a prior assessment, or
- A **Recommended Classification** in the current assessment.

Eligible classifications include:

- **Support at Home (SaH)**
- **Assistive Technology (AT)**
- **Home Modifications (HM)**



3. If the client is eligible, go to the **Seeking Services** page.

Depending on the client's classification, only the relevant service section (e.g., Support at Home, Assistive Technology, or Home Modifications) will be visible.

If no eligible classifications are present, this section will be hidden and display: *"There are no preferences for Seeking services at this time."*

If the client wants to seek services, toggle **Seeking services** under the relevant service's heading.

Jeremy Anderson

Client Assessment Support Plan

Upload Quick notes More options

Assessment Summary

IAT Outcome and Classifications

Identified Needs

Client concerns and goals

Recommendations

Seeking services

Associated People

Review

Seeking services

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

Support at Home

* Is the client seeking Home support services through the Support at Home program?

Seeking services Not seeking services

Home modifications

* Is the client seeking Home modifications services through the Support at Home program?

Seeking services Not seeking services

If **Not seeking services** is selected, assessors must choose a reason from a dropdown. If **Other. Please specify** or **Deceased** is selected, a text box will appear for further details.

Jeremy Anderson

Client Assessment Support Plan

Upload Quick notes More options

Seeking services

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

Support at Home

* Is the client seeking Home support services through the Support at Home program?

Seeking services **Not seeking services**

* What is the reason for not seeking Home support services preference?

Other. Please Specify

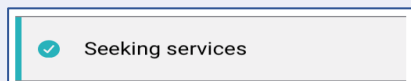
* Please specify other reason

0 of 100

Done

Does not want Restorative Care
Did Not Wish to Specify
Returned Mail
Other. Please Specify

4. For each visible sub-section, all compulsory fields must be filled out. When the page is complete, there will be a green tick next to the Seeking Services page on the side menu. You can then navigate to another section of the app.



15.4 Editing a Goal

You can edit a goal before uploading an assessment, support plan or during a support plan review if the recommendation is not already in place with a provider.

1. Go to the support plan and then go to the **Client concerns and goals** page. Expand the concern listing, and select the **Edit** (pencil) icon on the right of the desired goal.

Client concerns and goals

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

+ Add an area of concern

Concern 1

Edit

> 2 Goals

Concern 2

Edit

^ 1 Goal

Goal 2a

In progress

Strengths and abilities	Areas of difficulty	Motivation
Sample text	Sample text	5

Edit

Alternatively, select the Edit icon to the right of the Concern.

Client concerns and goals

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

+ Add an area of concern

Concern 1

Edit

> 2 Goals

Concern 2

Edit

> 1 Goal

Concern 3

Edit

> 1 Goal

2. The **Editing a client concern** page appears. Expand the goal listing, and select the **Edit** (pencil) icon on the right of the desired goal.

Editing a client concern

An area of concern consists of a description and goals to rectify or manage the area of concern. There can be multiple goals associated with an area of concern.



* **What is the area of Concern?**

Concern 1 9 of 500



+ Add another goal

^ 2 Goals

Goal 1b In progress

Strengths and abilities	Areas of difficulty	Motivation	
Sample text	Sample text	10	 

Goal 1a In progress

Strengths and abilities	Areas of difficulty	Motivation	
Sample text	Sample text	8	 

3. The **Editing A Goal** page appears.

Make sure all the mandatory fields are complete. These include:

- What is the client's goal?
 - What are the client's current strengths and abilities in relation to this goal?
 - What are the client's current areas of difficulty or activities where the client needs support in order to achieve this goal?
 - What is the focus of the goal for the client? (To regain a function, To receive care for a lost or declining function, or To compensate for a declining function)
 - Motivation to achieve (Scale of 1 to 10)
 - Goal status (In progress, Achieved, or No Longer Relevant)
4. Link goals to a recommendation. This is done at the **Recommendations** section of the **Editing a Goal** page.

Select the **Edit** (pencil) icon next to the pre-filled recommendation if this exists. The Pre-filled recommendation comes from the client's **Recommended Classification** from the **IAT Outcome and Classifications** page.

Alternatively, select the **+ Add a Recommendation** button at the bottom right of the page to add a recommendation that will be linked to this goal.

! Always edit the pre-filled recommendations first if it is available.

5. Finally, select **Save** at the bottom of the page.

15.5 Linking Goals to Recommendations

Clients with Recommended Classifications

If the client has a [Recommended Classification](#) in the IAT Outcome and Classifications page, then this classification will appear as a pre-filled recommendation, in the **Editing A Goal** page.

To Link Goals, ensure that there are [goals available to edit](#).

1. From the [Editing A Goal](#) page, select the **Edit** (Pencil) icon to the right of the pre-filled recommendation.

Editing a goal

* Goal status

In Progress Achieved No Longer Relevant

Recommendations

Home Support (End-of-Life)

+ Add a recommendation

Back Delete Save

2. The **Editing [Recommended Classification] services** page will appear.

Using Home Support services as an example, scroll down to the desired service.

[Ensure that the Recommended Service Intensity and Recommended Service Frequency are filled out](#) before selecting **+ No goals linked**. Otherwise, goals will not be linkable.

Editing Home Support services

All fields marked with an asterisk (*) are required

Transport

Direct transport + No goals linked

Recommended Service Frequency Recommended Service Intensity

Indirect transport + No goals linked

Recommended Service Frequency Recommended Service Intensity

Done

Time(s) per hour
Time(s) per day
Days per week
Days per month

3. After selecting **+ No goals linked**, the **Link Goals to [Service]** page appears.
Select the concern/s that fit the goal, then select **Select**.

Link Goals to Direct transport

Concern 1

Goal 1b

Goal 1a

Concern 2

Join the Bridge club

Concern 3

Goal 3a

4. Now the service has 1 goal linked and has an Updated status.
Repeat the above steps to link the same goal to another service if required.
Then, Select **Save**.

Editing Home Support services

All fields marked with an asterisk (*) are required

Transport

Direct transport Updated

Recommended Service Frequency: 1
Recommended Service Intensity: Days per week

Indirect transport

Recommended Service Frequency:
Recommended Service Intensity:

Personal care

Assistance with self-care and activities of daily living

- The **Editing A Goal** page now shows the linked goal underneath the pre-filled recommendations heading.

You can now link more goals to the pre-filled recommendations or select + Add a recommendation for other types of recommendations.

Finally, select **Save**.

Editing a goal

*** Goal status**

In Progress

Achieved

No Longer Relevant

Recommendations

Home Support (End-of-Life) 👁️ ✎️

Transport - Direct transport

+ Add a recommendation

Back

🗑️ Delete

📦 Save

- The **Recommendations** page now shows your goals linked to the recommendation or service.

Client

Assessment

Support Plan

Upload

Quick notes

More options

- ✔️ Assessment Summary
- IAT Outcome and Classifications
- Identified Needs
- Client concerns and goals
- Recommendations
- Associated People
- Review

Recommendations

All fields marked with an asterisk (*) are required

Support and community engagement	Digital education and support	No goals linked	👁️ ✎️
	Expenses to maintain personal affairs	No goals linked	
	Group social support	No goals linked	
	Individual social support	No goals linked	
Therapeutic services for independent living	Chiropractics	No goals linked	👁️ ✎️
	Direct transport	Goals linked	
Transport	Indirect transport	No goals linked	👁️ ✎️

For further information, go to My Aged Care | www.myagedcare.gov.au | 1800 836 799

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Clients without Recommended Classifications

To Link Goals, ensure that there are [goals available to edit](#).

Clients that do not have any Recommended Classifications or pre-filled Recommendations will have their Editing A Goal page looking like the screenshot below.

1. From the **Editing A Goal** page, select **+ Add a recommendation**

Editing a goal

1 2 3 4 5 6 7 8 9 10

* Goal status

In Progress Achieved No Longer Relevant

Recommendations

+ Add a recommendation

Back Delete Save

2. The **Recommendation** page appears. Select the recommendation.

Recommendation

Select a recommendation type

General Recommendation	Recommend →	Service Recommendation	Recommend →
Care Type under the Act	Recommend →	Assistive technology	Recommend →
Periods of Linking Support	Recommend →	Periods of Reablement	Recommend →

Ensure there is no duplication of recommendations or services, or a warning message will be displayed.

! There is already a classification under the same category

3. Ensure that all compulsory fields are filled out and then select **Save**.
Note that this goal is already associated with the recommendation.

Adding a Care Type under the Act

All fields marked with an asterisk (*) are required

If time-limited, when does the approval stop: ⓘ
31/01/2026 📅 🗑️

* What is the urgency of this care type? ⓘ
High Medium **Low**

* Is this emergency care?
Yes **No**

Reason or comments
Maximum 255 characters
0 of 255

Associated goals
 Goal A

Save Cancel

4. You will be taken back to the **Editing A Goal** page.

Any of your linked recommendations will display under the Recommendations heading, and then underneath each recommendation's sub-heading.

At this point you can **View** these recommendations again, **Edit** them, or add another recommendation altogether by selecting **+ Add a recommendation**.

Finally, select **Save**.

Editing a goal

Recommendations

General Recommendation

Buy a personal alarm

Care Type under the Act

Residential Permanent

+ Add a recommendation

Back **Delete** **Save**

- The **Recommendations** page now shows your goals linked to the recommendation or service.

The screenshot shows the 'Recommendations' page in a mobile application. At the top, there are three tabs: 'Client', 'Assessment', and 'Support Plan', with 'Support Plan' selected and highlighted with a red box. To the right of the tabs are three buttons: 'Upload', 'Quick notes', and 'More options'. Below the tabs is a sidebar menu with items: 'Assessment Summary', 'IAT Outcome and Classifications', 'Identified Needs', 'Client concerns and goals', 'Recommendations' (highlighted with a red box), 'Seeking services', 'Associated People', and 'Review'. The main content area is titled 'Recommendations' and includes a note: 'All fields marked with an asterisk (*) are required'. There are two recommendation cards: 'General Recommendation' with the text 'Buy a personal alarm' and 'Care Type under the Act' with the text 'Residential Permanent'. Each card has a 'Goals linked' section with two icons: a circle with an eye and a pencil.

16. Uploading assessment and support plan information to the assessor portal

! The device must be connected to the internet to upload an assessment.

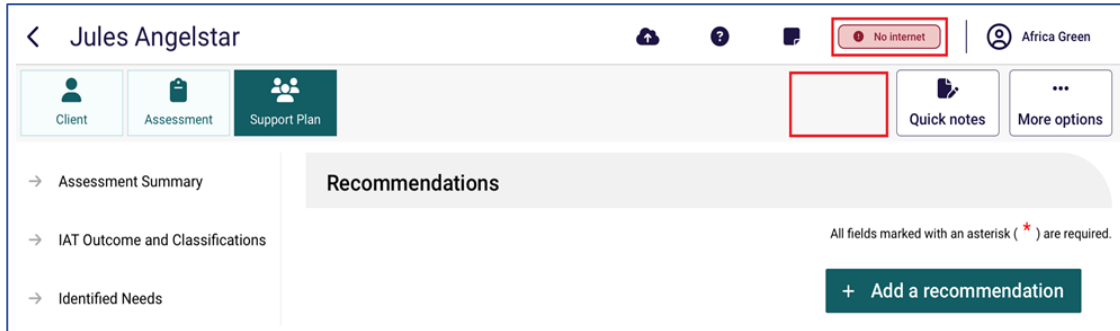
16.1 Uploading assessment and support plan information for downloaded assessments

To upload assessment and support plan information for a client whose referral you have downloaded and assessment you have undertaken on the App, follow the steps below.

- For the assessment you wish to upload, select **Upload** from either the **Client**, **Assessment** or **Support Plan** sections.

The screenshot shows the 'Recommendations' page for a client named 'Jules Angelstar'. At the top, there are three tabs: 'Client', 'Assessment', and 'Support Plan', with 'Support Plan' selected and highlighted with a red box. To the right of the tabs are three buttons: 'Upload' (highlighted with a red box), 'Quick notes', and 'More options'. Below the tabs is a sidebar menu with items: 'Assessment Summary', 'IAT Outcome and Classifications', 'Identified Needs', 'Client concerns and goals', 'Recommendations' (highlighted with a red box), 'Associated People', and 'Review'. The main content area is titled 'Recommendations' and includes a note: 'All fields marked with an asterisk (*) are required'. There is a green button labeled '+ Add a recommendation'. Below this are two recommendation cards: 'Service Recommendation' with the text 'Equipment and products - Mobility products' and 'Meals', and 'Care Type under the Act' with the text 'Residential Permanent'. Each card has a 'No goals linked' section with two icons: a circle with an eye and a pencil.

! If not connected, the **Upload** button will not be available.



The **Upload Assessment** page will display. Address any incomplete sections if required by selecting **Cancel** and uploading again at a later time.

Upload assessment

Was this assessment conducted in a remote setting?

i A remote assessment is an assessment conducted in a remote or very remote area of Australia. This is when an assessment is conducted in either a MMM6 or MMM7 geographical area as defined by the Modified Monash Model (MMM). You can check the MMM classification of a location on the doctorconnect website.

! Assessment is incomplete
There are outstanding questions in the assessment for Referral Incoming
Section: Triage

- How long has the client experienced this circumstance?
- Are you currently receiving any aged care services?
- Are you able to walk?
- What type of assessor is recommended for client assessment?
- Require an urgent assessment?
- Priority of assessment

i Are you sure you would like to upload this assessment
You will no longer be able to make changes to the assessment after uploading it. You may still review the assessment on the device for 7 days from the time of upload.

! **Incomplete or invalid questions will not prevent you from uploading the assessment.** However, you will need to complete all mandatory questions before you can complete the assessment in the assessor portal.

You will not be able to upload the assessment if the Assessment summary exceeds 5,000 characters.

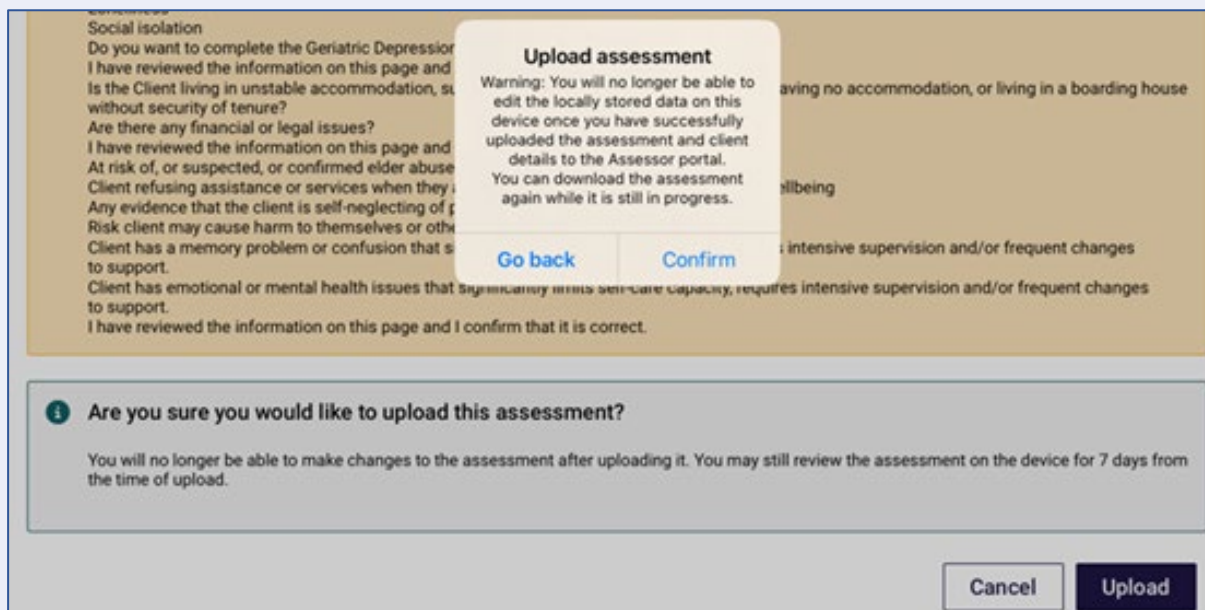
2. If your face-to-face assessment was conducted in a remote location, you should ensure that the **Remote Assessment** indicator is selected before the assessment is uploaded. To determine if an assessment is conducted in a remote location, please review the information provided within the help icon.

Was this assessment conducted in a remote setting?

i A remote assessment is an assessment conducted in a remote or very remote area of Australia. This is when an assessment is conducted in either a MMM6 or MMM7 geographical area as defined by the Modified Monash Model (MMM). You can check the MMM classification of a location on the doctorconnect website.

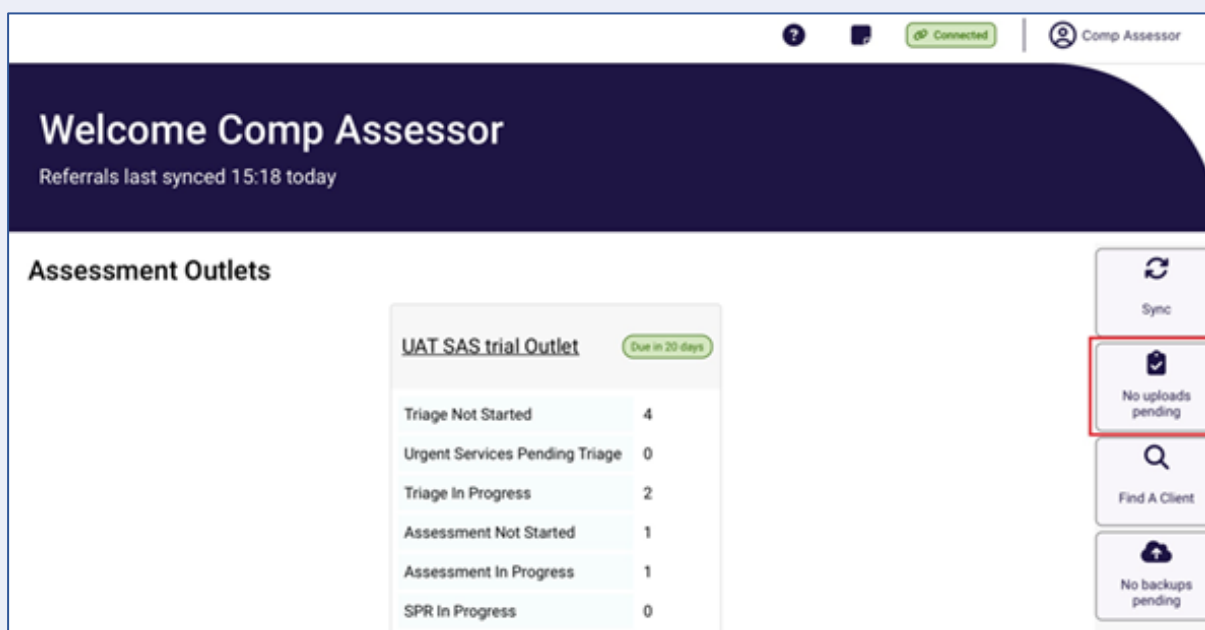


3. Select **Upload**, and then select **Confirm** in the pop-up window.



4. The assessment will now be uploaded to the My Aged Care assessor portal.

The information you added as part of the assessment will automatically populate the corresponding fields, where applicable, in the assessor portal and will display as **Pending Uploads** on the Dashboard in the App.



5. Once you have uploaded the client's information to the assessor portal, you can remove the client locally from your device.

From now on, the client's referral and assessment is only viewable through the portal.

The only way to interact with the client record using the App is to download the client's referral again.

16.2 Uploading assessments for offline clients

To upload assessment information for offline clients' assessments created on the App when not connected to the internet, the offline client will need to be registered locally or linked to an existing client record.

Following the client's registration, needs assessors can [self-refer clients for assessment](#) before uploading the assessment.

! If the client already has an in-progress assessment, you will not be able to upload the assessment. This should be confirmed prior to starting the assessment for an offline client.

For more information regarding this process please refer to the [My Aged Care – Assessor Portal User Guide 1 – Registering and referring clients](#).

16.3 Locally registering an offline client

If you do not have a referral assigned to you for an offline client saved locally to your device, you will need to register the client and arrange for a referral to be issued and assigned to you.

This process can **only** be done when connected to the internet.

! If you have a referral assigned to you for the offline client you wish to upload to the assessor portal, follow the steps in [Linking offline clients and assessments](#).

Once the offline client has been registered and a referral has been assigned to you in the assessor portal, you can link the offline client to the assessment referral and upload the assessment to the assessor portal.

Follow the steps below to locally register an Offline client.

1. Select the Offline client that you wish to register from your Dashboard.

The screenshot shows the 'Dashboard' of the Assessor Portal. At the top, it indicates 'Not connected' and the user is 'Comp Assessor'. Below the header, there are filters for '5 assessments, sorted by Client Last Name'. The main content area displays five client cards:

- Jonas Abrego**: Self referral, Triage not started, Medium priority. Aged Care ID, Assessment type: Comprehensive, First Clinical: 19 days overdue.
- Harry Cleora**: Self referral, Triage not started, High priority. Aged Care ID, Assessment type: Comprehensive, First Clinical: 27 days overdue.
- Harry Miller** (highlighted with a red box): Self referral, Triage not started, Medium priority. Aged Care ID, Assessment type: Comprehensive, First Clinical: [blank].
- Harry Nichols**: Self referral, Triage not started, Low priority. Aged Care ID, Assessment type: Comprehensive, First Clinical: Due in 20 days.
- Harry Strong**: Self referral, Triage not started, Low priority. Aged Care ID, Assessment type: Comprehensive, First Clinical: 4 days overdue.

On the right side of the dashboard, there are three action buttons: 'Sync', 'New Assessment', and 'Backup Assessment'.

2. Select **More options**, then **Register Client** at the pop up.

Harry Miller

Client Assessment Support Plan Complete Triage Quick notes More options

Client Profile

Estimated Age * 85

Gender * Male

Country of Australia

Ethnicity * African

Does the client identify as an * No - Neither

Preferred language * English

Assessment options

Remove Client from Device

Register Client

Add to Existing Client

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

3. The App will do a real-time check for any potential duplicates. Select **View Potential Matches** to view the possible matching client records.

If there are no matches, select **Register** and proceed to step 5.

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

2 potential duplicate matches were found

View Potential Matches

Register

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

Register a client

Review potential duplicate client

Client details

- Harry Miller
- Harry Miller

First name	Harry	Harry
Middle name		
Last name	Miller	Miller
Date of Birth	01/07/1938	01/07/1938
Home phone		
Address	Level 1, 260 ELIZABETH Street SURRY HILLS NSW 2010	
Mobile phone		(Not Applicable)
Email		
Medicare		
DVA No		
CRN		
ACMPS		

Use new record Use existing record

If none of the potential duplicate matches are the client you are registering, select **Use new record** to complete the registration process: you will need to indicate client consent to register prior. If you wish to use the matching record, select **Use existing record**.

- Where any client demographic information conflicts between the two records being merged, you must select which information to retain before saving.

The **Online record** is the record that already exists in My Aged Care, and **Captured offline** is the offline client saved locally to your device.

Harry Miller

Resolve client record conflicts

* The below client information has been identified as conflicting between the two records you are merging. Please select the correct client information before saving. This information will be saved locally until the client is backed up to My Aged Care.

	Captured offline	Online record
Title	Mr	Dr
Gender	Male	Not Specified

Cancel Save client merge

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

5. Once the offline client has been successfully registered or linked to an existing record, the client details page will display.

← Dashboard ?

Harry Miller's Details

- About
- Event Summary and Approvals
- Refer for Assessment

Personal Information

Born 1st July 1938

Communication requirements

No communication requirements provided

Identity documents (ID)

Medicare	
DVA	
CRN	
ACMPS	
SPARC ID	
Aged Care ID	AC52447042

Identity status

Not Attempted

Health Insurance

No health insurance provided

Address details

Home address:	12 FURZER Street PHILLIP
---------------	-----------------------------

To upload the client to the assessor portal, you will need to link the client to a referral, by either [self-referring clients for assessment](#) to automatically link the client's assessment information prior to uploading or facilitating a referral for assessment prior to [linking to the registered client](#).

16.4 Linking offline clients and assessments

Before uploading the assessment, you will need to link the offline client (locally registered or saved) to an existing client in My Aged Care.

1. In the Offline client's assessment, select **More Options**, then select **Add to Existing Client** at the pop up that appears.

The screenshot shows the 'Client Profile' screen for Harry Miller. The top navigation bar includes 'Client', 'Assessment', and 'Support Plan' tabs. The 'More options' menu is open, showing 'Remove Client from Device', 'Register Client', and 'Add to Existing Client'. The 'Add to Existing Client' option is highlighted with a red box. The form fields include Title (Mr), First name (Harry), Middle name, Last name (Miller), Date of Birth, Estimated Age (85), and a note that all fields marked with an asterisk (*) are required.

2. You will be prompted to call 1800 836 799. Select **Yes** if you have:

- Already contacted the My Aged Care contact centre, and had a referral sent to your organisation and assigned to you, or
- Self-referred a client to your organisation.

! Needs assessors can select [Self refer](#) if the reason for assessment is in-hospital, remote assessment, First Nations or homeless or at risk of, and there is no existing referral for the client downloaded to their device.

For all other referrals, needs assessors are advised to call the My Aged Care service provider and assessor helpline on 1800 836 799.

! A person assigned the Team Leader role in the assessor portal will need to accept the referral and then a Triage Delegate can conduct triage or assign it to another Triage Delegate for triage. Once triage is completed and the assessment has been assigned to you then it will appear in your assessments queue in the assessor portal.

3. A list of existing clients that you can transfer the assessment information will appear. Select the name of the client, then select **Continue**.

Add to existing client

* Merge Harry Miller's Comprehensive Assessment information to:

Harry Boyer

Harry Jones

Harry Miller

This will remove Harry Miller's record from your device and transfer any answers from the assessment to the downloaded referral. Are you sure?

The assessment information collected about the offline client will now be transferred to the existing client, and the assessment can be uploaded to the My Aged Care assessor portal, following the process in [Uploading assessment and support plan information for downloaded assessments](#).

17. Conducting Support Plan Reviews

Needs assessors can use the App to:

- conduct Support Plan Reviews for clients' reviews they have downloaded
- conduct a Support Plan Review for a client they have previously assessed.

The steps to undertake a review on the App are as follows.

- ! To conduct a Support Plan Review (SPR), you must have the client assigned to you in the Assessor Portal before completing the SPR in the App.
- ! From 29 June 2026, all clients receiving CHSP services must have a CHSP classification. Assessors can add CHSP classifications for delegate approval during the client's Support Plan Review.

17.1 Downloading a Support Plan Review

1. Open the App and navigate to the main dashboard. Search for the client using filters or sort function.

If all clients' details are synchronised and downloaded from the Assessor portal, go to [Completing a support plan review](#).

2. If the client's details are yet to be downloaded from the Assessor Portal, there will be a **Download** icon at the client card. Click on the client card to download the Support Plan Review.

Dashboard

Filters 2 assessments, sorted by Client Last Name

Brook Resp
SPR in progress Low priority
PALMERSTON, ACT, 2913
Aged Care ID AC17337023
Assessment type Support
Review Type Ad-hoc

Club RespY
SPR in progress Low priority
Aged Care ID
Assessment type Support
Review Type Ad-hoc

Sync
New Assessment
Backup Assessment

3. The client tile will show the download in progress.

Download assessment for Club RespY

Step	Progression
<input checked="" type="checkbox"/> Download Client Details	Downloaded
<input checked="" type="checkbox"/> Download Client Notes	Downloading
<input type="checkbox"/> Download Client Approvals	Ready for download
<input type="checkbox"/> Download Last Completed Review	Ready for download
<input type="checkbox"/> Download Support Plan	Ready for download

4 sync steps remaining

Close

This is the page that shows the download progress of the Support Plan in detail. Select **Close** to return to the Dashboard.

- Once downloading is finished, you will be able to click **Open assessment** to continue or return to the dashboard.

Step	Progression
✓ Download Client Details	Downloaded
✓ Download Client Notes	Downloaded
✓ Download Client Approvals	Downloaded
✓ Download Last Completed Review	Downloaded
✓ Download Support Plan	Downloaded

+ Open assessment
Close

17.2 Completing a Support Plan Review

- Select the client's card from the Dashboard.

Dashboard > Filters 37 assessments, sorted by Client Last Name

Client Name	Priority	Location	Aged Care ID	Assessment type	Assessment status	Completed Support Plan due by
<u>Georgina Smith</u>	Low priority	QUEANBEYAN, NSW, 2620	AC36322840	Comprehensive	In progress	29/06/2025 (30 days)
<u>Michelle Smith</u>	End of Life, High priority		AC36219541	Comprehensive	In progress	24/04/2025 (36)

Sync Referrals
New Assessment
Backup Assessments

2. Select the 'Support Plan' button.

The screenshot shows the 'Client Profile' page for Georgina Smith. The top navigation bar includes a back arrow, the client name 'Georgina Smith', and user information 'Africa Green'. Below the navigation bar are three tabs: 'Client', 'Assessment', and 'Support Plan', with 'Support Plan' highlighted by a red box. To the right of the tabs are buttons for 'Upload', 'Quick notes', and 'More options'. The main content area is titled 'Client Profile' and contains a sidebar with menu items: 'Client Profile', 'Contact Details', 'Support Network and Cohabitants', 'Wallet check', 'Event summary and Approvals', 'Attachments', and 'Notes'. The main content area has form fields for 'Title' (Ms), '* First name' (Georgina), 'Middle name', and '* Last name' (Smith). A note at the top right states 'All fields marked with an asterisk (*) are required.'

3. The Support Plan **Review** page will display.

The screenshot shows the 'Assessment Summary' page for Georgina Smith. The top navigation bar includes a back arrow, the client name 'Georgina Smith', and user information 'Africa Green'. Below the navigation bar are three tabs: 'Client', 'Assessment', and 'Support Plan', with 'Support Plan' highlighted. To the right of the tabs are buttons for 'Upload', 'Quick notes', 'Clear page information', and 'More options'. The main content area is titled 'Assessment Summary' and contains a sidebar with menu items: 'Assessment Summary', 'IAT Outcome and Classifications', 'Identified Needs', 'Client concerns and goals', 'Recommendations', 'Associated People', and 'Review'. The main content area has text for 'Introduction', 'Situation', and 'Background'. A note at the top right states 'All fields marked with an asterisk (*) are required.'

Before starting the review, you can view the client's support plan and review history (if applicable) by navigating to the **History** page.

In the **History** page, you can see details of the client's **Last Completed Review**. The support plan review request and outcome details will be displayed only if the client has previously had a review completed.

You can also start the review from the **History** page.

You can also view the client's:

- last completed review
- assessment summary
- identified needs
- client concerns and goals
- recommendations.

- As well as viewing this information, you can schedule a future support plan review in the **Support Plan** tab.

The screenshot shows the 'Support Plan' tab selected in the top navigation bar. The left sidebar contains a list of sections: Assessment Summary, IAT Outcome and Classifications, Identified Needs, Client concerns and goals, Recommendations, Associated People, and Review (highlighted). The main content area is titled 'Review' and contains two required fields: 'Schedule a date to review the client's Support Plan' and 'Reason for review?'. A note at the top right states 'All fields marked with an asterisk (*) are required'.

- Navigate to each of the pages in the support plan to start the review. Once selected, the review will load which will allow you to edit the client's support plan.

! During the Support Plan Review, needs assessors can add general and service recommendations, Long-Term Living arrangement, and Periods of Reablement and Linking Support.

Assessors can recommend a **second Restorative care record to a Support At Home Restorative Care Pathway**.

The second unit is subject to the number of available RCP places for any given financial quarter. For more information refer to [Support at Home program manual – A guide for registered providers](#).

Once the support plan is edited, the **Recommendations** section will display all recommendations made during the Support Plan edit. This means that any new recommended aged care records linked to the displayed classification (Support at Home, or End-Of-Life) will appear instead of the originally approved aged care records.

! During the Support Plan Review, if the client's recommendation is a Support at Home classification or a Transitioned Support at Home classification, assessors can reset (override) the classification to **Support At Home End-Of-Life Pathway**.

This will need to be done after End-of-life documents are verified, and before submitting the Support Plan Review.

Conversely assessors can also override a End-Of-Life Pathway recommendation to a Transitioned Support at Home classification.

- Once the review is complete and all sections have been updated, you can upload the review, similar to [uploading assessments and support plan information](#).

18. Completing the match and refer process and finalising the assessment or completing the review

To complete the support plan and Support Plan Review, refer to the [My Aged Care – Assessor Portal User Guide 7 – Completing a support plan and support plan review](#)

Or to complete the match and refer process and finalise the assessment, refer to the [My Aged Care – Assessor Portal User Guide 8 – Referring for services](#)

! If you have undertaken an assessment using the App, you will need to contact the client to develop the client's support plan, confirm their referral preferences and obtain their consent to send referrals for service.

19. Removing assessments and reviews from the device

You may choose to remove client details from your device to increase storage space and allow for easier navigation from the App Dashboard. To manually remove client details from the device, follow the steps below.

! Removing a client record from the device will permanently delete any assessment or review information recorded on that device and that has not been uploaded to the assessor portal.

1. Open the App. The dashboard page will be displayed, select your outlet that contains the client's assessment. Once in the outlet, search and select the client card.

The screenshot shows the 'Dashboard' page of the My Aged Care Assessor Portal. At the top, there is a navigation bar with a back arrow, a help icon, a 'Connected' status indicator, and a user profile for 'Sammy Stark'. Below the navigation bar, there is a 'Filters' section indicating '7 assessments, sorted by Client Last Name'. The main content area displays two client cards. The first card is for 'Test Client' and the second is for 'Aaron Jones'. The 'Aaron Jones' card is highlighted with a red border. To the right of the cards are three action buttons: 'Sync Referrals', 'New Assessment', and 'Backup Assessments'. The 'Aaron Jones' card details include: CRONULLA, NSW, 2230; Aged Care ID: AC19537430; Assessment type: Home Support Assessment; Assessment status: Triage in progress; and Completed Triage due by: 21/09/2024 (4 days overdue).

2. From any page in the client's record, you can remove the record from the device by selecting **More options** and then **Remove Client from Device** from the pop up.

Harry Miller

Client Assessment Support Plan

Complete Triage Quick notes More options

Client Profile

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

Client Profile

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

Title

Mr

First name

Harry

Middle name

Last name *

Miller

Date of Birth Estimated Age

Estimated Age *

85

Assessment options

Remove Client from Device

Register Client

Add to Existing Client

Select **Remove Assessment** to remove the record.

following fields are mandatory or invalid:

Remove Assessment

You are about to remove this record from your device.

Any changes that are not backed up will be lost.

Are you sure you would like to continue?

Remove Assessment

Go back

! Clients with uploaded assessments will still appear in the app when you select **Refresh** until you complete the client's support plan in the assessor portal.

20. Completing a Residential Respite Classification Assessment

! Unlike Support Plan Reviews and Comprehensive assessments, Residential Respite Assessments can only be completed from the App.

If you are using a PC or Laptop to complete the assessment, a [Windows compatible \(sideloaded\) version](#) of the App is available.

Residential Respite Assessments are an assessment of the care recipient's mobility utilising the Modified de Morton Mobility Index (DEMMI-modified). Respite Classifications are used to determine the level of subsidy Residential Service Facilities will receive for the care of Respite clients under the Australian National Aged Care Classification (AN-ACC) funding model.

There are 12 tasks in DEMMI-modified, select one rating only for each of the twelve tasks that best matches the resident's capabilities.

The DEMMI-modified is an instrument that measures the mobility of older people across clinical settings. It is preferably based on direct observation of the resident. However, it is not appropriate to ask a resident to complete tasks if there is a falls risk or risk of causing distress to the resident. The clinical needs assessor should use their clinical judgement to evaluate if the DEMMI-modified can be undertaken and at what point the assessment should cease.

The four DEMMI domains are:

- bed mobility
- chair
- static balance (no gait aid)
- walking.

Only clinical needs assessors who have completed training in DEMMI-modified based respite assessments under the AN-ACC funding model can assess clients using the DEMMI-modified.

For information on the DEMMI-modified tool, refer to the [AN-ACC Reference Manual](#).

To complete the DEMMI-modified in the App first an assessment must be downloaded to the App. Refer to [Self-Refer a Care Recipient for a Residential Respite Assessment](#) or [Complete an assigned Residential Respite Assessment Referral](#) for guidance.

Clinical needs assessors can use the App to:

- conduct a Residential Respite Classification Assessment they have downloaded
- self-refer Residential Respite Classification Assessments
- reject Residential Respite Classification Assessments.

20.1 Refer for a Residential Respite Assessment

! Unlike Support Plan Reviews and Comprehensive assessments, Residential Respite Assessments can only be completed from the App.

If you are using a PC or Laptop to complete the assessment, a [Windows compatible \(sideloaded\) version](#) of the App is available.

1. Open and log in to the App. Select **Find A Client** from the dashboard. You can follow the steps set out in the section [Finding a client](#).

Welcome Comp Assessor
Referrals last synced 11:44 today

Assessment Outlets

UAT SAS trial Outlet Due in 19 days	
Triage Not Started	2
Urgent Services Pending Triage	0
Triage In Progress	2
Assessment Not Started	0
Assessment In Progress	1
SPR In Progress	2

Facilities (AN-ACC)

[In home respite](#)

Sync
No uploads pending
Find A Client
No backups pending

2. Search and open the client's record.

Once you are in the client's record, confirm that the personal details are correct. Then, select **Event Summary and Approvals** and ensure that the client has a current Residential respite care approval.

Barry Bartels's Details

- About
- Event Summary and Approvals**
- Refer for Assessment

Triage History

Triage Completed on 06 June 2024 12:28 pm by Comp Assessor from UAT SAS trial Outlet.
Outcome: Comprehensive (clinical) assessment required

Other recommendations

Residential Respite Care (Low priority)

Current care approvals

Home Care Package Level 1
Approval start date 3 March 2020

Residential Permanent
Approval start date 3 March 2020

Residential Respite Low Care
Approval start date 3 March 2020

Residential Respite Care
Approval start date 6 June 2024

3. Go to the Refer for Assessment tab, and select the type **Residential Respite Assessment**.
Input an Assessment date, ensure the assessment date is the date that you conducted the assessment.

The Assessment date may impact the effective date of the classification that is generated and subsidy paid to the provider.

Confirm the correct Assessment Setting is selected and once the details are correct and click **Create Referral**.

Barry Bartels's Details

- About
- Event Summary and Approvals
- **Refer for Assessment**

Refer Barry Bartels for Assessment

A Residential Respite referral will be created for the client.

Select an outlet for referral

UAT SAS trial Outlet

Select an assessment type: *

Residential Respite Assessment

Assessment date *

06/06/2024

Assessment Setting: *

Non-Hospital

Reason for self referring:

Change in Respite Care needs

Create Referral

4. A confirmation screen appears, confirming that the referral was created successfully.
Click the **Go Back** button to return to the Dashboard to the downloaded client that you have self-referred.

Dashboard

Barry Bartels's Details

- About
- Event Summary and Approvals
- **Refer for Assessment**

Refer Barry Bartels for Assessment

A Residential Respite referral will be created for the client.

Referral created successfully
Go back to home screen to download client

Go Back

Refer to [Starting an assigned Residential Respite Assessment Referral](#) on how to complete the DEMMI-modified.

20.2 Starting an assigned Residential Respite Assessment Referral

Residential Respite Assessments that have been assigned to you by your Team Leader will automatically appear on your App.

To access your assigned Residential Respite Assessments, navigate to the Dashboard and click on your outlet.

The screenshot shows the app dashboard for 'Comp Assessor'. At the top, it says 'Welcome Comp Assessor' and 'Referrals last synced 13:09 today'. Below this, there is a summary for 'UAT SAS trial Outlet' with a 'Due in 25 days' badge. The summary includes the following data:

Category	Count
Triage Not Started	3
Urgent Services Pending Triage	0
Triage In Progress	3
Assessment Not Started	0
Assessment In Progress	1
SPR In Progress	2

On the right side, there are several action buttons: 'Sync', 'No uploads pending', 'Find A Client', and 'Backup Assessment'. Below the summary, there is a section for 'Facilities (AN-ACC)' with a sub-section for 'In home respite' which is highlighted with a red box. The 'In home respite' section shows the following data:

Category	Count
Not started	0
In progress	1
Completed	1

1. To complete the assessment, click on the client's card to download the assessment to your device.

The screenshot shows a list of assessments for 'In home respite' (2 Assessments). The list is sorted by First Name A-Z. There are two assessment cards: 'Barry Bartels' and 'Harry Miller'. The 'Barry Bartels' card is highlighted with a red box. The 'Barry Bartels' card shows the following details:

Field	Value
Aged Care ID	AC91331652
Date of birth	25/03/1942
Assessment type	Residential Respite

The 'Harry Miller' card shows the following details:

Field	Value
Aged Care ID	
Date of birth	01/07/1938
Assessment type	Residential Respite

2. Select **Start Assessment**.

The screenshot shows the 'Start Assessment' screen for 'Barry Bartels'. The text on the screen reads: 'You are about to start an assessment for Barry Bartels (AC91331652, 25 Mar 1942, Female). This will put the assessment in-progress.' A red box highlights the 'Start Assessment' button, which is a play button icon.

20.3 Completing a Residential Respite Assessment

1. Confirm the client details are correct by reviewing the **Identification and assessment details** section.
2. Select the **de Morton Mobility Index (DEMMI) – Modified** tab to complete the Modified DEMMI Assessment. Select the question mark to display tool help. This will provide guidance on how to complete the assessment. Complete all mandatory fields until the page has a tick next to it.

In home respite
AC91331652

67% complete

More options

Identification and assessment details

De Morton Mobility Index (DEMMI) - Modified

Assessor comments form

DEMMI

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

Bed

*Bridge

Unable Able

*Roll onto side

Unable Able

*Lying to sitting

Unable Minimal assistance Supervision Independent

Chair

*Sit unsupported in chair

Unable 10 seconds

3. Tool tips are available by selecting the information icon in the top right-hand corner of each question.

Identification and assessment details

De Morton Mobility Index (DEMMI) - Modified

Assessor comments form

DEMMI

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

Bed

*Bridge

Person is lying supine and is asked to bend their knees and lift their bottom clear of the bed

Unable Able

*Roll onto side

Unable Able

*Lying to sitting

Unable Minimal assistance Supervision Independent

Chair

*Sit unsupported in chair

4. Once the assessment is complete you may add comments.

These comments will be stored with the assessment and can be viewed by the department if needed.

The screenshot shows the 'In home respite AC91331652' assessment interface. At the top, a green progress bar indicates '100% complete'. There are 'Complete' and 'More options' buttons. The left sidebar lists 'Identification and assessment details', 'De Morton Mobility Index (DEMMI) - Modified', and 'Assessor comments form' (highlighted with a red box). The main area is titled 'Comments' and contains the text 'Please add any comments you have in relation to this assessment below:' followed by a text input field with the placeholder 'Test example of assessor notes.' and a character count '31/4000'. A note at the top right states 'All fields marked with an asterisk (*) are required.'

5. Once the assessment is complete select the **Complete** button.

This screenshot is identical to the previous one, but the 'Complete' button in the top right corner is highlighted with a red box.

6. Select **Complete Assessment** at the next screen.

This will submit the assessment and generate a classification for the client, there is no further action required.

The screenshot shows the 'Complete Assessment' screen. At the top, there is a navigation bar with a back arrow, a help icon, a 'Connected' status indicator, and a user profile icon labeled 'Comp Assessor'. The main heading is 'Complete Assessment'. Below this, the text reads: 'You are about to complete this assessment. Once completed you cannot edit the assessment, however you will be able to review it and upload it. You can Reopen the assessment to edit it by 'Reopening' it before uploading.' A dark blue button labeled 'Complete Assessment' is highlighted with a red box.

7. Following this you will be re-directed to the Upload Assessment page. Select **Upload**.

The screenshot shows the 'Upload Assessment' page for a 'Residential Respite' assessment. The assessment summary includes the following details:

Name	Aayden Johnson
Date of Birth	5 February 1940
Gender	Female
Date of Assessment	26 September 2024
PPE supplied and used	
Is the Client receiving care in a Memory Support Unit?	

Below the summary, the DEMMI (De Morton Mobility Index) section is shown with the following details:

Bed	
Bridge	Unable

An 'Upload' button is highlighted in a red box at the bottom right of the form.

20.4 Rejecting a Residential Respite Assessment

If a Team Leader assigns a residential respite assessment to you, you can choose to reject it.

1. Open and log in to the App, [download and open an assessment](#). Select actions in the top right corner, then select **Reject Referral** from the pop up.

The screenshot shows the 'Assessment Details' page for an 'In home respite' assessment (AC25955113), which is 67% complete. A 'More options' menu is open in the top right corner, and the 'Reject referral' option is highlighted with a red box. The assessment details include:

- Care type: Respite
- Assessment date: 14/06/2024
- Client details: The resident has only one name (No), First name: acatgr

2. Select the appropriate rejection reason, this may be either **Client Deceased**, **Entered a residential facility** (Refer to Step 3), or **Other** (below). Please note, for the reason **Client Deceased** please contact your team lead or the My Aged Care contact centre to complete the process.

The screenshot shows the rejection reason selection screen. It includes a confirmation message: 'Are you sure you would like to reject this referral? All in progress assessments for this referral will be cancelled.' Below this, there are three options for the 'Referral status reason': 'Client Deceased', 'Entered a residential facility', and 'Other' (which is selected). A text area for the 'Rejection reason' is also visible, with a maximum character limit of 500.

3. If the client has entered a residential service facility, please select **Entered a residential facility**. These referrals will now be assigned to an appropriate RFA Organisation.

The options provided are either searching by residential facility name or suburb/postcode; Or if you are unsure, please select **Unsure** and a departmental officer will be assigned the referral manually.

Reject acatgsr respite's Referral

Are you sure you would like to reject this referral?
All in progress assessments for this referral will be cancelled.

Referral status reason ▾
Client Deceased
Entered a residential facility
Other

Search for a residential facility ▾
Enter a residential facility name
Enter a suburb/postcode
Unsure
2900 Search

Enter a 4 digit postcode, or enter 3 or more letters to search Suburb
Select a residential facility: ▾
Yaralla Place

Comments

Reject Referral

4. Once all the criteria have been entered select **Reject Referral**. The referral will now be rejected, there is no further action needed.
5. Residential Respite Assessments for clients who have entered a residential facility are to be completed by Residential Funding Assessors.

If a client has entered a Residential Facility, reject the referral due to Entered a residential facility by completing the following steps:

- a. Select Entered a residential facility.
- b. Either enter a residential facility name, enter a suburb/ postcode or if you are unsure select Unsure.
- c. Select Search.
- d. Scroll down until the applicable Residential Facility has been highlighted and select done.

! You can upload an assessment to the My Aged Care assessor portal from the App without answering all mandatory questions.

However, you will need to complete all mandatory questions before you can complete the assessment in the My Aged Care assessor portal.

Clinical needs assessors are expected to contact the client to confirm the outcome of the assessment, discuss the client's service preferences, and obtain consent to send referrals for service.

Part C – Residential aged care funding assessments (RAC funding assessors)

21. Conducting an RAC funding assessment

! 'Assessment' in part C refers to residential aged care funding assessments completed by residential aged care funding assessors who complete assessments using the Australian National Aged Care Classification (AN-ACC) assessment tool.

21.1 Find a client

1. On the **Facilities** page, all assessment referral/s that have been assigned to you will be listed. Scroll up and down to view more facilities and clients. Select a facility to display all referrals for that Facility that are assigned to you.

Facilities (AN-ACC)

Facility Name	Days Overdue	Not started	In progress	Completed
Edge Hill Orchards	365 days overdue	1	0	0
Gosling Creek Aged Care	270 days overdue	4	0	0

2. Once you have clicked on the facility you want to assess in, the resident referrals for this facility will be displayed. Scroll up and down the page to locate the resident you wish to assess or use sort and filter options to narrow the number of residents being displayed.

! If you are not connected to the internet, only referrals that have been previously downloaded will be available.

It is recommended that you sync your device daily before commencing.

Dashboard UAT Pitz RESI- HCP & STRC outlet (7 Assessments) Connected | Unrestricted 1 UAT

> Filters 7 assessments, sorted by First Name A-Z

AGAntwon UATHayes	AGLeonard UATLinnie
<p>237 days overdue Not started</p> <p>Aged Care ID AC23765274</p> <p>Date of birth 09/11/1940</p> <p>Assessment type Residential Permanent</p>	<p>237 days overdue Not started</p> <p>Aged Care ID AC08129645</p> <p>Date of birth 08/12/1940</p> <p>Assessment type Residential Permanent</p>
AGNorval UATKoelpin	AGZiemann UATFrieda
<p>237 days overdue Not started</p> <p>Aged Care ID AC83537217</p> <p>Date of birth 18/09/1940</p> <p>Assessment type Residential Permanent</p>	<p>237 days overdue Not started</p> <p>Aged Care ID AC35942036</p> <p>Date of birth 03/03/1941</p> <p>Assessment type Residential Permanent</p>

Sync
New Assessment
Quality Assurance Assessment
No uploads pending
No backups pending

3. You can filter or order referrals in the following ways:

- filtering on keyword for example First Name, Last Name or Aged Care ID
- filtering on the Status (Assessment status)
- filtering Assessment type
- order on First Name or Last name in ascending or descending alphabetical order
- sorting on due or departure date in ascending or descending order.

Dashboard UAT Pitz RESI- HCP & STRC outlet (7 Assessments) Connected | Unrestricted 1 UAT

^ Filters 7 assessments, sorted by First Name A-Z

Keyword

Q Keyword filter

Order Status Assessment type

First Name A-Z Select a status Select an assess...

× Clear filters

AGAntwon UATHayes	AGLeonard UATLinnie
<p>237 days overdue Not started</p> <p>Aged Care ID AC23765274</p> <p>Date of birth 09/11/1940</p> <p>Assessment type Residential Permanent</p>	<p>237 days overdue Not started</p> <p>Aged Care ID AC08129645</p> <p>Date of birth 08/12/1940</p> <p>Assessment type Residential Permanent</p>

Sync
New Assessment
Quality Assurance Assessment

Select the Filter dropdown to expand the filter menu. It displays the Sort By option and Filter options. The Filter option text box is an active search. It will refine results when typed.

In the following example, the residents are sorted by Last name in ascending alphabetical order, and any residents' names that contains "Ra" will appear.

The screenshot shows a dashboard interface. At the top, there is a navigation bar with a back arrow, the text "Dashboard UAT Pitz RESI- HCP & STRC outlet (7 Assessments)", a help icon, a printer icon, a "Connected" status indicator, and a user profile icon labeled "Unrestricted 1 UAT". Below the navigation bar, there is a filter menu section. It includes a "Filters" header with a "Filters applied" indicator and a summary: "1 assessment, sorted by Last Name A-Z, filtered by 'Ra'". A search box labeled "Keyword" contains the text "Ra" and a "Cancel" button. Below the search box, there are three filter categories: "Order" (set to "Last Name A-Z"), "Status" (set to "Select a status"), and "Assessment type" (set to "Select an assess..."). A "Clear filters" button is located to the right. Below the filter menu, a resident record for "Ram Chandra" is displayed. The record includes a "115 days overdue" status, "Not started" and "Reassessment" buttons, and a table with the following data: Aged Care ID: AC03906039, Date of birth: 03/05/1976, Assessment type: Residential Respite. To the right of the record are three action buttons: "Sync", "New Assessment", and "Quality Assurance Assessment".

4. Select the resident's record.

Depending on the resident's assessment status, selecting the record will either start the assessment, or will be directed to the first page of the assessment in progress.

Start of an assessment

The screenshot shows a screen titled "Nia Sharma" with a back arrow and a chat icon. The main content area contains the following text: "You are about to start an assessment for Nia Sharma (AC67952275, 03 Feb 1967, Female). This will put the assessment in-progress." Below this text are two buttons: "Start Assessment" (with a play icon) and "Reject Referral" (with a trash icon). Below these buttons is a question: "Is a quality assurance or training assessment also being conducted?". At the bottom, there are two buttons: "QUALITY ASSURANCE" and "TRAINING".

Assessment in progress

← Nia Sharma
Connected
Unrestricted 1 UAT

UAT Pitz RESI- HCP & STRC outlet
AC67952275

18% complete

More options

- Identification and assessment details
- Palliative Care
- Nursing
- Resource Utilisation Group - Activities of Daily Living
- Australia-modified Karnofsky Performance Status
- Frailty
- Braden Scale
- De Morton Mobility Index (DEMMI) - Modified
- Australian Modified - Functional Independence Measure
- Behaviour Resource Utilisation Assessment
- Assessor comments form

Assessment Details

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

Assessment details

Care type
Permanent

Assessment date *
30/05/2024

***Was PPE supplied by your organisation used?**

Yes
 No

***Is the Client receiving care in a Memory Support Unit?**

Yes
 No

Client details

The resident has only one name
No

21.2 Self-Referral

! Prior to conducting a self-referral, RAC funding assessors should contact the department.

RAC funding assessors can self-refer the assessment when they identify a resident in a service or facility that does not have an assessment referral. This could happen if the resident has entered care since the time of the assessment referral being issued.

1. Select **New Assessment** on the right-hand side in the facility dashboard menu.

← Dashboard UAT Pitz RESI- HCP & STRC outlet (7 Assessments)
Connected
Unrestricted 1 UAT

Filters 7 assessments, sorted by First Name A-Z

AGAntwon UATHayes

237 days overdue Not started

Aged Care ID	AC23765274
Date of birth	09/11/1940
Assessment type	Residential Permanent

AGLeonard UATLinnie

237 days overdue Not started

Aged Care ID	AC08129645
Date of birth	08/12/1940
Assessment type	Residential Permanent

AGNorval UATKoelpin

237 days overdue Not started

Aged Care ID	AC83537217
Date of birth	18/09/1940

AGZiemann UATFrieda

237 days overdue Not started

Aged Care ID	AC35942036
Date of birth	02/02/1941

Sync

New Assessment

Quality Assurance Assessment

No uploads pending

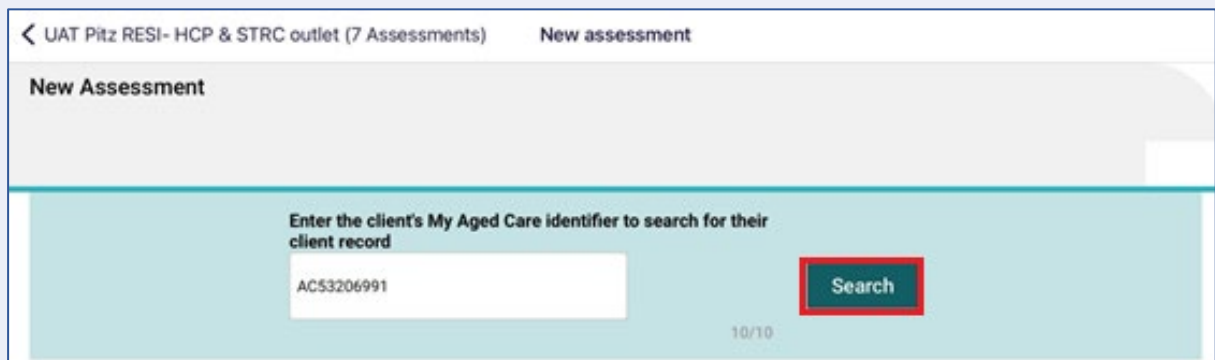
No backups pending

For further information, go to My Aged Care | www.myagedcare.gov.au | 1800 836 799

185

2. The **New assessment** screen appears. Enter the resident's My Aged Care client identifier (AC ID) and select **Search**.

The service provider will be able to provide the AC ID for the resident.



UAT Pitz RESI- HCP & STRC outlet (7 Assessments) New assessment

New Assessment

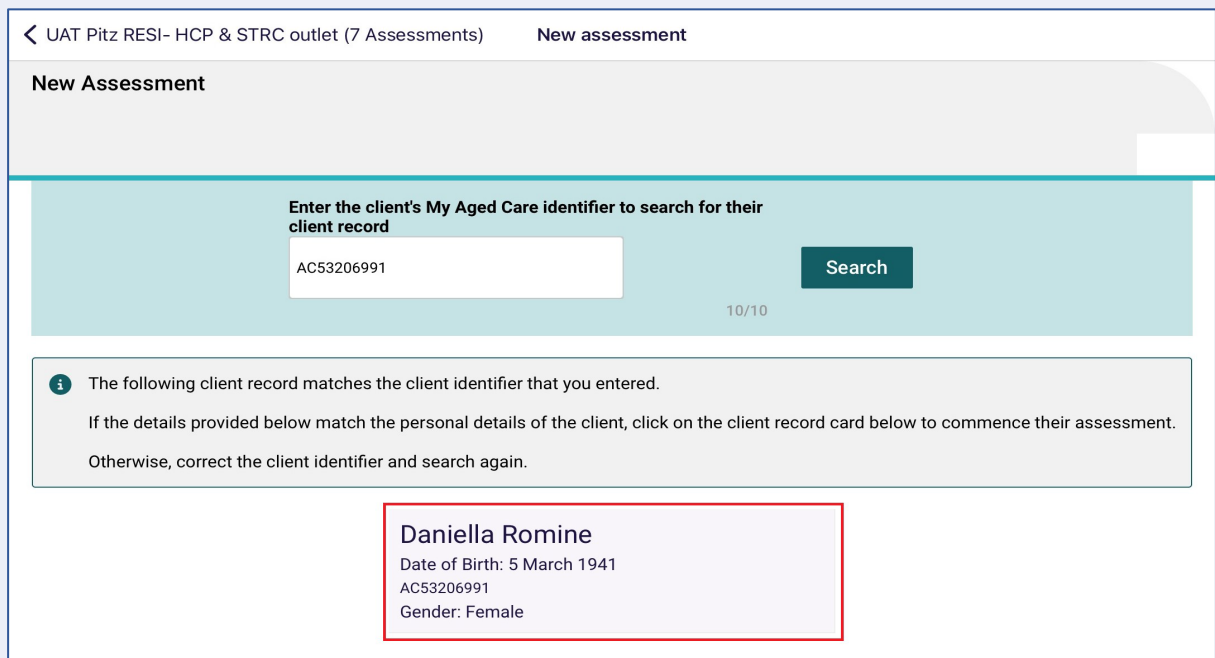
Enter the client's My Aged Care identifier to search for their client record

AC53206991

Search

10/10

3. Check the details of the search result. If the details are correct, select the record to start the assessment.



UAT Pitz RESI- HCP & STRC outlet (7 Assessments) New assessment

New Assessment

Enter the client's My Aged Care identifier to search for their client record

AC53206991

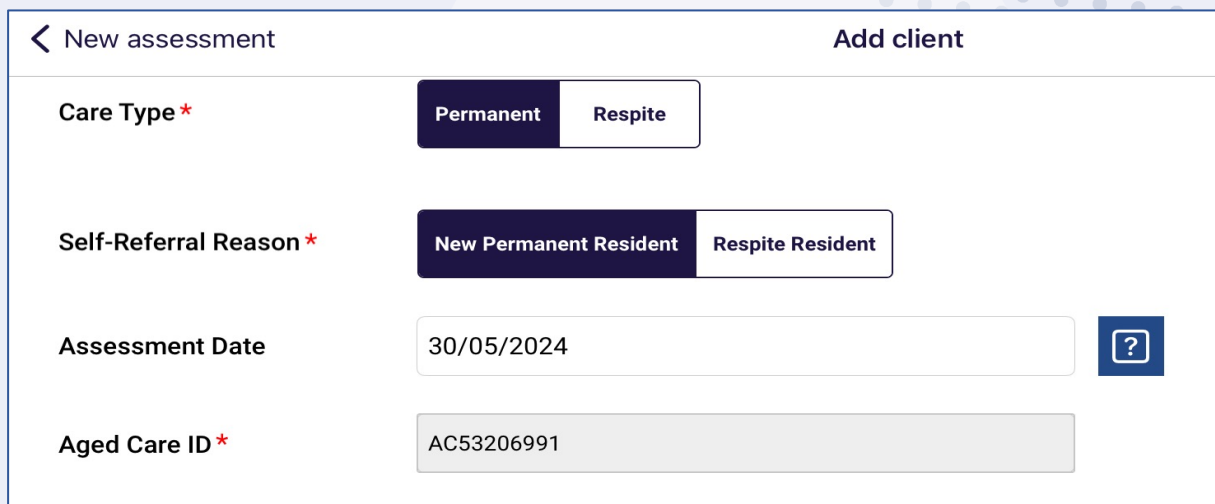
Search

10/10

i The following client record matches the client identifier that you entered.
If the details provided below match the personal details of the client, click on the client record card below to commence their assessment.
Otherwise, correct the client identifier and search again.

Daniella Romine
Date of Birth: 5 March 1941
AC53206991
Gender: Female

4. If required, fill in any mandatory fields in the **Add Client** page, by selecting the appropriate options. Mandatory fields are shown by a red line over the field name and a red asterisk.



New assessment Add client

Care Type * Permanent Respite

Self-Referral Reason * New Permanent Resident Respite Resident

Assessment Date 30/05/2024 ?

Aged Care ID * AC53206991

5. Once all mandatory fields are complete, select **Start Assessment**.

← New assessment Add client

Care Type* Permanent Respite

Self-Referral Reason* New Permanent Resident Respite Resident

Assessment Date ?

Aged Care ID* 10/10

The resident has only one name

First Name* 8/50

Last Name* 6/50

Date of Birth ?

Gender* Female

Start Assessment

6. The client record will now appear in the main menu under the status of **In-progress**.

You can use the filter function to highlight all the assessments with this status.

← Dashboard UAT Pitz RESI- HCP & STRC outlet (6 Assessments) ? Connected | Unrestricted 1 UAT

Filters 2 assessments, sorted by First Name A-Z

Keyword

Order First Name A-Z **Status** In Progress - 2 **Assessment type**

x Clear filters

AGMarlee UATColt 252 days overdue In progress	Pridata UAT 256 days overdue Urgent In progress
Aged Care ID: AC34890376	Aged Care ID: AC98773435
Date of birth: 31/07/1941	Date of birth: 01/07/1924
Assessment type: Residential Permanent	Assessment type: Residential Permanent

Sync Referrals
New Assessment
Quality Assurance
Upload 2 Completed
Backup A

21.3 Undertaking Assessments

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

! For comprehensive information on how to complete the clinical component of the assessment, refer to your [AN-ACC Assessor Manual](#).

1. Open and log in to the App, following the process in [Find a Client](#), locate the resident you wish to assess and open their assessment referral.
2. Complete each page of the assessment which includes clinical tools.

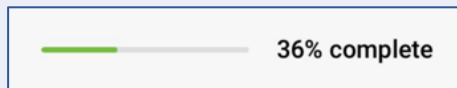
The below screenshot shows a typical page in an assessment.

The screenshot displays the assessment interface for 'UAT Pitz RESI- HCP & STRC outlet AC67952275'. The progress bar indicates '36% complete'. The left sidebar lists assessment sections: Identification and assessment details (checked), Palliative Care (checked), Nursing (checked), Resource Utilisation Group - Activities of Daily Living (teal arrow), Australia-modified Karnofsky Performance Status (grey arrow), Frailty (grey arrow), Braden Scale (grey arrow), De Morton Mobility Index (DEMMI) - Modified (grey arrow), Australian Modified - Functional Independence Measure (grey arrow), Behaviour Resource Utilisation Assessment (grey arrow), and Assessor comments form (checked). The main content area shows the 'RUG-ADL' section with two sub-sections: '*Bed Mobility' and '*Toileting'. Each sub-section has a table with five options: '1 - Independent or Supervision only', '2 - (Not a valid option for this question)', '3 - Limited physical assistance', '4 - Other than two persons physical assist', and '5 - Two or more persons physical assist'. A note states 'All fields marked with an asterisk (*) are required.' The right sidebar contains navigation icons: back, help, home, and chat.

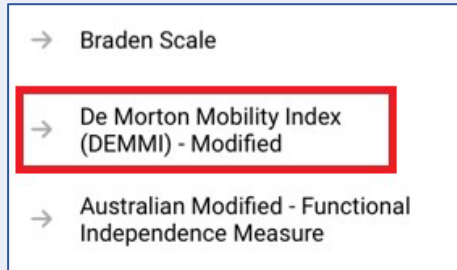
3. As you complete each section, the progress bar shows grey ticks for each completed and teal arrows for in progress or incomplete sections.


This close-up shows the assessment sidebar with a red box highlighting the first three sections: 'Identification and assessment details', 'Palliative Care', and 'Nursing', each with a grey checkmark. Below them, 'Resource Utilisation Group - Activities of Daily Living' has a teal arrow, and 'Australia-modified Karnofsky Performance Status' has a grey arrow.

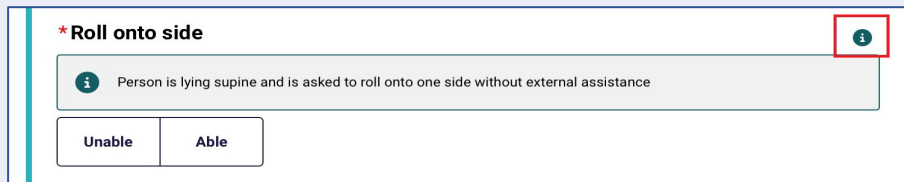
- There is an overall assessment progress percentage complete indicator at the top of the screen.



- Select a specific clinical tool or page by selecting the associated tab.

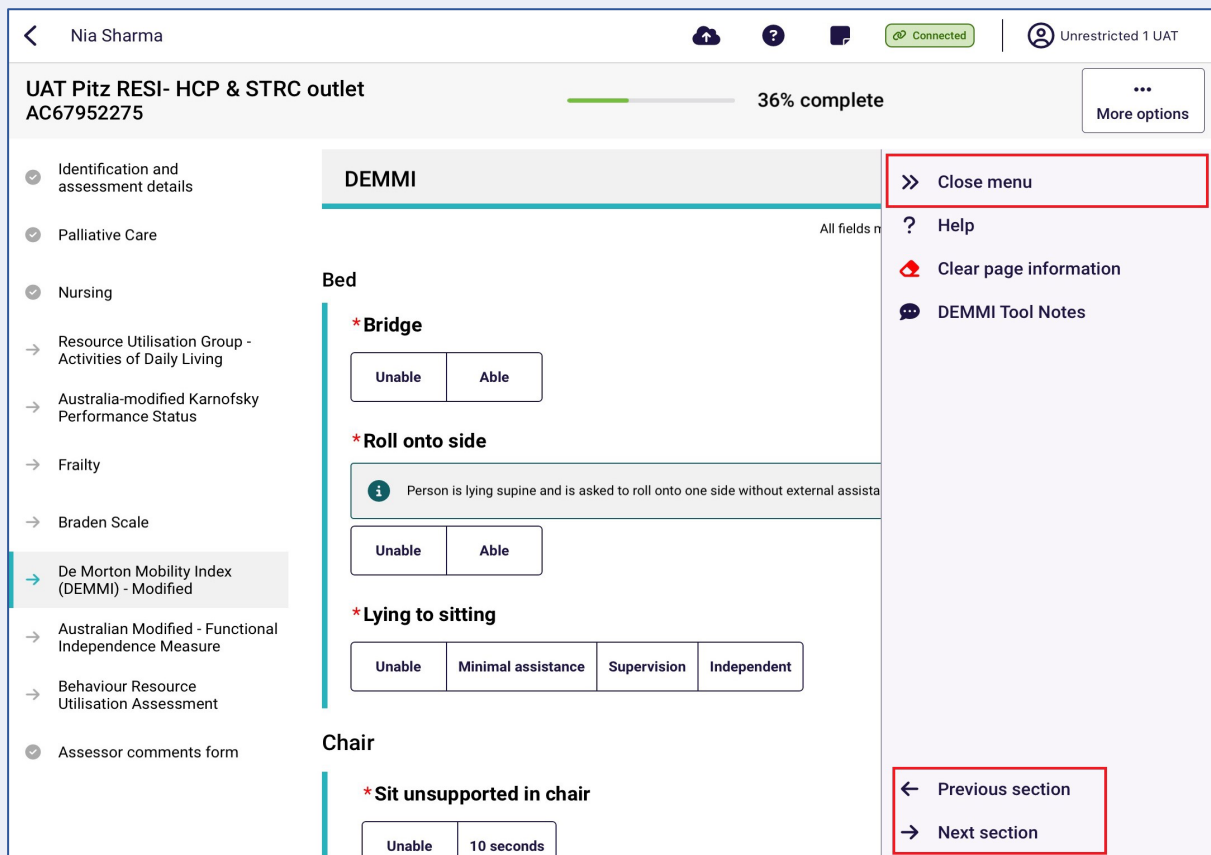


- Select the information  icon next to each question, to find out more information about the question.

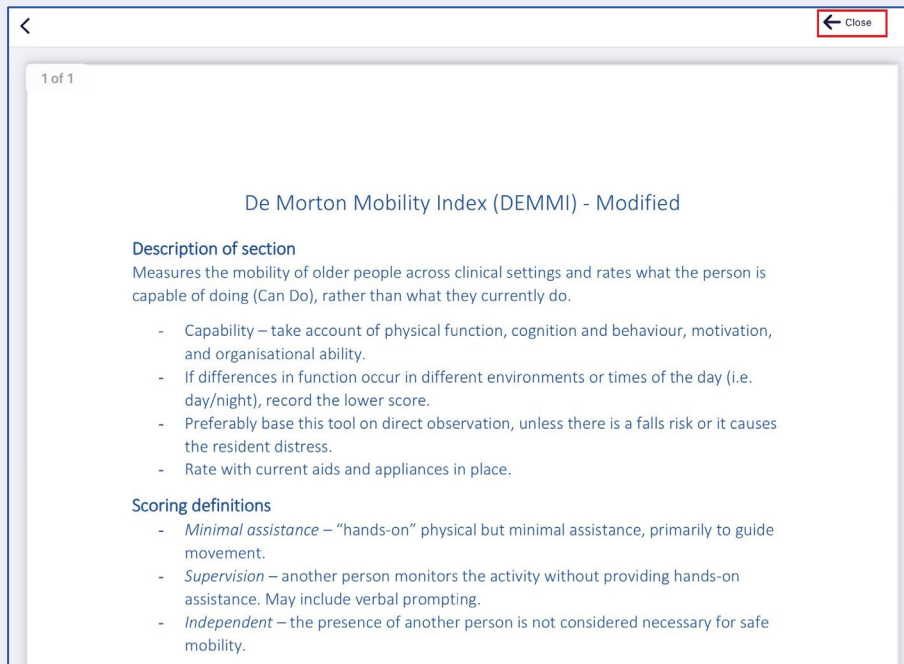


! You must fill out all mandatory questions. Mandatory fields are shown by a red line over the field name and a red asterisk.

- Select the double chevron << on the top right side of the screen to expand the menu and to navigate to the previous and next sections.



8. In this menu you can also select? **Help** to display more detailed information about that page or tool. It will open on another screen. Select **Close** to return to the assessment.

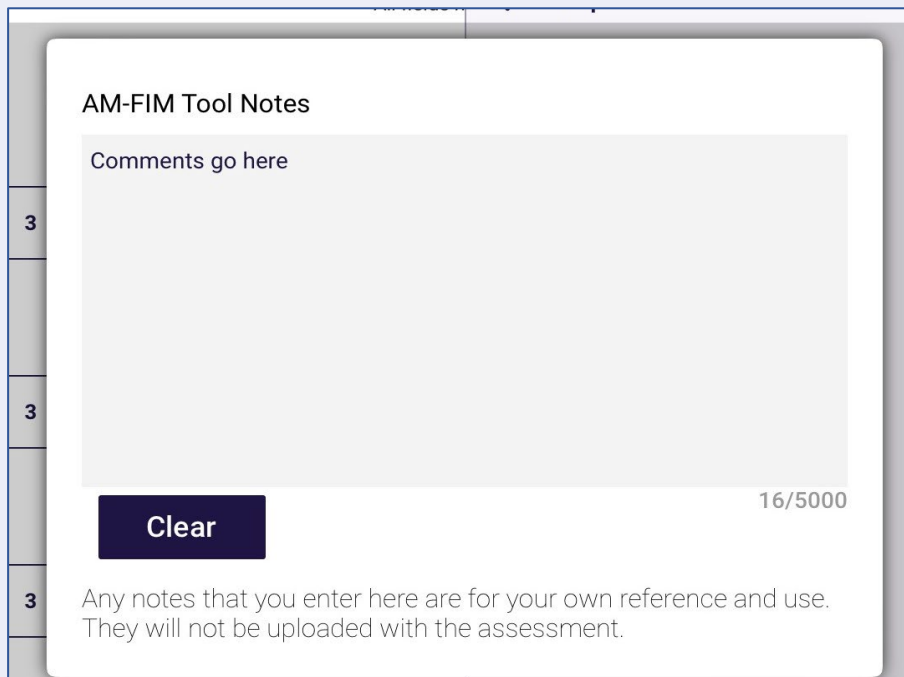



On each tool, there is a notes section where you can enter notes or comments.

Selecting the speech bubble icon  next to this section will expand the comments section.

Any comments made here are for your own reference and will not be uploaded with the assessment.

The below screenshot example shows the **AM-FIM Tool Notes** page.



With some notes sections there is an additional information  section. It gives additional information to that in the Help sections.



AM-FIM Tool Notes

1	Total assistance (subject = less than 25%)
2	Maximal assistance (subject = 25%+)
3	Moderate assistance (subject = 50%+)
4	Minimal assistance (subject = 75%+)
5	Supervision (subject = 100%+)
6	Modified independence (device)
7	Complete independence (timely, safely)

9. Finally, there is a **Clear page information** section denoted by the red eraser icon. Select this and then select **Clear answers** at the pop-up, to permanently erase answers.

The screenshot shows the AM-FIM tool interface for user Nia Sharma. The main content area displays the 'Self-care' section with 'Eating' and 'Grooming' tasks. A 'Clear Page' dialog box is overlaid on the 'Eating' task, asking 'Are you sure you would like to clear all answers for this section?' with 'Go back' and 'Clear answers' buttons. The 'Clear answers' button is highlighted with a red box. On the right sidebar, the 'Clear page information' option is also highlighted with a red box. The sidebar also shows 'AM-FIM Tool Notes' and 'Close menu' options.

22. Undertaking Quality Assurance and Training Assessments

RAC funding assessors can conduct Quality Assurance and Training assessments in the App. There are two methods available.

! Quality Assurance and Training assessments cannot be undertaken on self-referred assessments.

22.1 Sharing referral details with the assessor undertaking the assessment

The unrestricted RAC funding assessor is assigned to undertake the assessment.

1. Out of your facilities, select the facility where the resident being assessed lives.

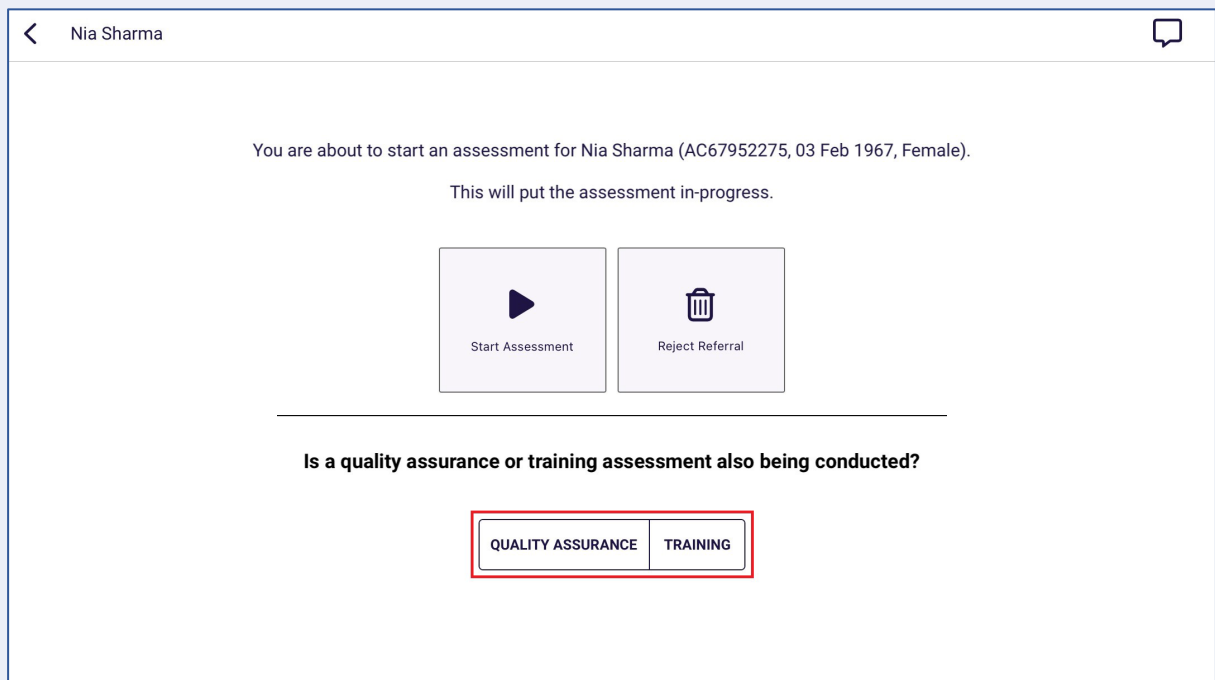
The screenshot shows the app dashboard for an unrestricted user. At the top, there is a navigation bar with a help icon, a profile icon, a 'Connected' status indicator, and the user name 'Unrestricted 1 UAT'. Below this is a large dark blue header with the text 'Welcome Unrestricted 1 UAT' and 'Referrals last synced 13:39 today'. The main content area is titled 'Facilities (AN-ACC)' and contains two facility cards. The first card, 'Edge Hill Orchards', is highlighted with a red border and shows '365 days overdue' and a table with 1 'Not started', 0 'In progress', and 0 'Completed' assessments. The second card, 'Gosling Creek Aged Care', shows '270 days overdue' and a table with 4 'Not started', 0 'In progress', and 0 'Completed' assessments. On the right side, there is a vertical sidebar with four buttons: 'Sync', 'No uploads pending', 'Quality Assurance', and 'No backups pending'.

2. Next, select the client.

The screenshot shows the app interface for selecting a client. At the top, there is a navigation bar with a back arrow, the text 'Dashboard UAT Pitz RESI- HCP & STRC outlet (7 Assessments)', a help icon, a profile icon, a 'Connected' status indicator, and the user name 'Unrestricted 1 UAT'. Below this is a section titled 'Filters' with a 'Filters applied' button and the text '2 assessments, sorted by First Name A-Z, filtered by 'Ni''. The main content area contains two client cards. The first card, 'AGLeonard UATLinnie', is highlighted with a red border and shows '238 days overdue' and 'Not started' status, with a table listing 'Aged Care ID' (AC08129645), 'Date of birth' (08/12/1940), and 'Assessment type' (Residential Permanent). The second card, 'Nia Sharma', is also highlighted with a red border and shows '102 days overdue' and 'Not started' status, with a table listing 'Aged Care ID' (AC67952275), 'Date of birth' (03/02/1967), and 'Assessment type' (Residential Permanent). On the right side, there is a vertical sidebar with four buttons: 'Sync', 'New Assessment', 'Quality Assurance Assessment', and 'No backups pending'.

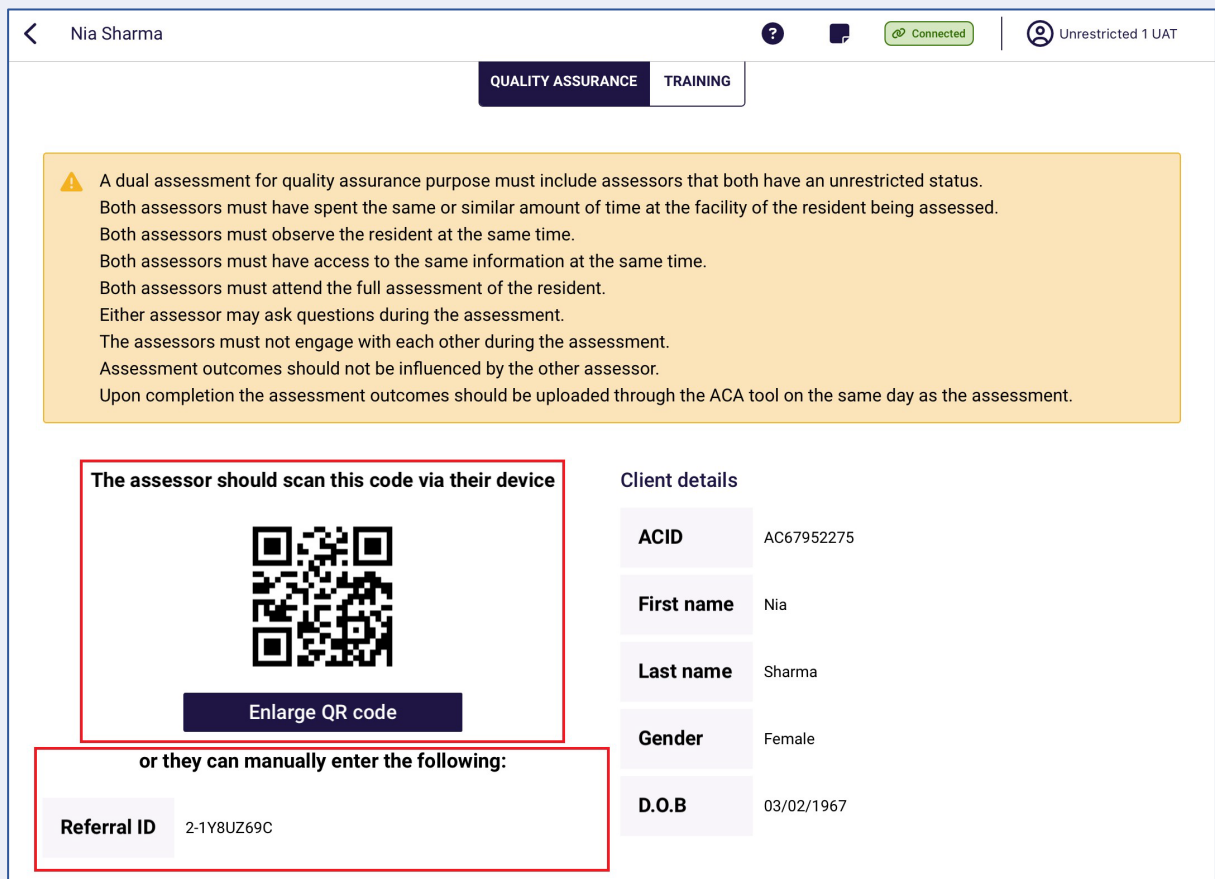
3. A Pre-assessment screen appears.

The assigned assessor can select if a **Quality Assurance** or **Training** assessment is also being conducted.



4. The assessment details to be shared will be displayed.

The RAC funding assessor that will be conducting the Quality Assurance or Training assessment must scan the QR code or enter the Referral ID on their device.



Alternatively, referral details can also be shared after starting an assessment.

On the assessment page, select the **ellipses (three dots)** and select **Share referral details** at the pop-up.

The screenshot shows the 'Assessment Details' page for 'UAT Pitz RESI- HCP & STRC outlet AC67952275'. The page is 9% complete. A 'More options' menu is open, showing the following actions: 'Clear page', 'Remove assessment', 'Reject referral', and 'Share referral details'. The 'Share referral details' option is highlighted with a red box. The assessment form includes fields for 'Care type' (Permanent), 'Assessment date' (31/05/2024), and two required questions: '* Was PPE' and '* Is the Client receiving care in a Memory Support Unit?'. The 'Client details' section shows 'The resident has only one name' with a 'No' response.

5. In the Share referral details screen, select the **Quality Assurance** or **Training** options.

The screenshot shows the 'Share referral details' screen. The question is 'Is a quality assurance or training assessment also being conducted?'. Below the question are two buttons: 'QUALITY ASSURANCE' and 'TRAINING'. Both buttons are highlighted with a red box.

! Referrals can only be shared by the assessor assigned to undertake the assessment. Referrals cannot be shared after the assessment is finalised and uploaded.

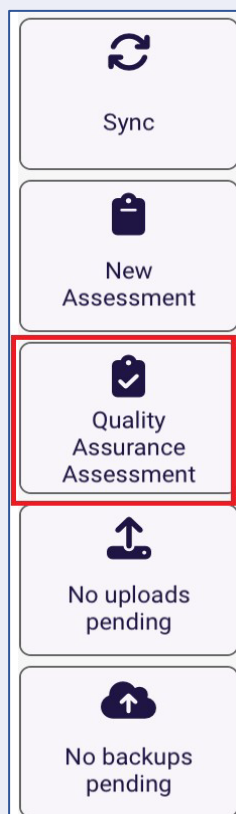
22.2 Scanning referral QR code or entering the referral ID

1. Select the appropriate assessment button under **Quick Actions** in the main menu.

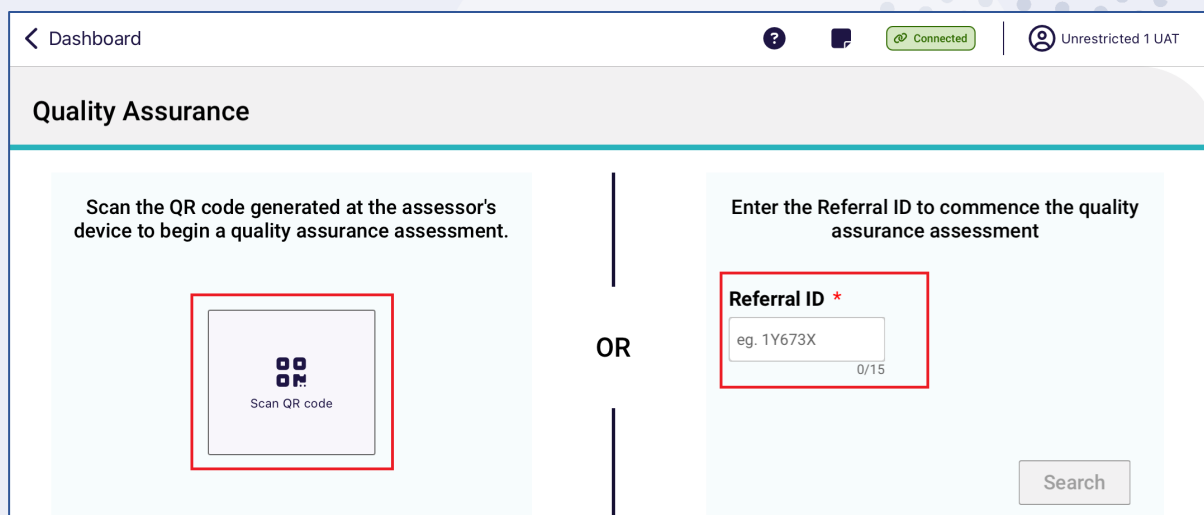
! The **Quality Assurance** and **Training** buttons visible will be dependent on the role of the user.

Senior RAC funding Assessors undertaking a Quality Assurance will need to select the **Quality Assurance** button, or if conducting a Training assessment, select the **Training** button.

A RAC funding assessor (Restricted) undertaking a Training assessment will need to select the **Training** button.



2. Select either to **Scan the QR code** generated on the device of the RAC funding assessor that will undertake the assessment, or enter the **Referral ID**. Then select **Search**.



After the Referral ID is successfully matched, confirm the client's details before starting the Quality Assurance or training assessment.

If the RAC funding assessor has been unable to successfully match the Referral ID, this could be due to a [connectivity issue](#) or the referral ID is not valid. If there is a connectivity issue a [local \(offline\) assessment](#) can be undertaken.

3. The Quality Assurance or Training assessment screen will now appear. A banner at the top of the screen indicates the type of assessment type that is being undertaken. The below screenshot shows the Quality Assurance assessment example.

You are conducting a Quality Assurance Assessment

! RAC funding assessors that have started a Quality Assurance or a Training assessment will not have the ability to reject the referral, but can remove the assessment.

22.3 Local (Offline) Assessments

Assessments could be done offline if there is an issue with internet connectivity. This applies to normal assessments as well as Quality Assurance and Training assessments. However, the assessment cannot be uploaded to the My Aged Care system until the client details that were entered whilst offline are successfully matched with a client record in the system.

The screenshot shows the 'New Assessment' screen. At the top, there is a status bar with a question mark icon, a 'Not connected' indicator, and 'Unrestricted 1 UAT'. Below this is a header 'New Assessment'. The main content area has a light blue background with the text 'Enter the client's My Aged Care identifier to search for their client record'. A text input field contains 'AC49733751' and a 'Search' button is to its right. Below the search area is a red error message box with a warning icon: 'You are operating offline and it is not possible to match the client identifier that you entered with a client record. You can start an assessment while offline, but it cannot be uploaded until the client details that you enter are matched with a client record.' At the bottom of the screen is a 'Start Assessment' button.

1. After starting a local assessment, you will be required to complete all mandatory fields including assessment details and client details.

The screenshot shows the 'Add client' screen. At the top, there is a status bar with a question mark icon, a 'Not connected' indicator, and 'Unrestricted 1 UAT'. Below this is a header 'Add client'. The main content area has a white background with several form fields: 'Facility *' with a dropdown menu showing 'UAT Pitz RESI- HCP & STRC outlet'; 'Care Type *' with radio buttons for 'Permanent' and 'Respite'; 'Self-Referral Reason *' with radio buttons for 'New Permanent Resident' and 'Respite Resident'; 'Assessment Date' with a date picker showing '06/06/2024'; 'Aged Care ID *' with a text input field containing 'AC49733751'; and a checkbox labeled 'The resident has only one name' which is currently unchecked.

- Once back online and connected to the internet, you will be required to match the local assessment with the correct Referral ID after commencing the assessment. This can be done when they have internet connectivity and selecting the **Matched client** button.

⚠ You will not be able to upload this assessment until the client details entered are matched to the correct client record using the MATCH CLIENT button

You are conducting a Self Referral Assessment

UAT Pitz RESI- HCP & STRC outlet 18% complete
AC49733751

Match Client
More options

Identification and assessment details

- Palliative Care
- Nursing
- Resource Utilisation Group - Activities of Daily Living
- Australia-modified Karnofsky Performance Status
- Frailty
- Braden Scale
- De Morton Mobility Index (DEMMI) - Modified
- Australian Modified - Functional Independence Measure
- Behaviour Resource Utilisation Assessment

Assessment Details

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

Assessment details

*** Care type**

Permanent

Respite

Assessment date

6 June 2024

*** Was PPE supplied by your organisation used?**

Yes

No

*** Is the Client receiving care in a Memory Support Unit?**

Yes

No

- If the details do not match, you will need to go back and update the details to match or choose which details to use if the client ID is matched correctly. You will not be able to click **Confirm** unless the details are corrected.

Match the client's details

⚠ The client details that you entered in the assessment do not match with the client record.
Go back and check the details that you have entered and search again.

	Client details entered	Details from client record
First Name	Cole son	Coleson
Last Name	McLaughlin	Mclaughlin
Date of Birth	24 November 1932	24 November 1932
Gender	Male	Male
SPARC ID		
ACMPS ID		

Confirm

- Once the details match, select **Confirm**, and continue with the rest of the assessment.

Match the client's details

⚠ One or more of the client details entered do not match with the client record.

If this is not the correct client record, go back and check the details that you have entered and search again.

If you confirm that this is the correct client record, the client details entered will be overwritten with those from the client record.

	Client details entered	Details from client record
First Name	Coleson	Coleson
Last Name	McLaughlin	Mclaughlin
Date of Birth	24 November 1932	24 November 1932
Gender	Male	Male
SPARC ID		
ACMPS ID		

Confirm

23. Completing, re-opening and uploading assessments

23.1 Completing an assessment

If there are any pages that are incomplete or needs review, the progress bar will be under 100% and the page that has not been completed will not show a tick icon.

- Select each of the pages that have an arrow to complete.

Nia Sharma
Connected
Unrestricted 1 UAT

UAT Pitz RESI- HCP & STRC outlet
AC67952275

73% complete

More options

- Identification and assessment details
- Palliative Care
- Nursing
- Resource Utilisation Group - Activities of Daily Living
- Australia-modified Karnofsky Performance Status
- Frailty
- Braden Scale
- De Morton Mobility Index (DEMMI) - Modified
- Australian Modified - Functional Independence Measure
- Behaviour Resource Utilisation Assessment
- Assessor comments form

RUG-ADL

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

***Bed Mobility**

1 - Independent or Supervision only
2 - (Not a valid option for this question)
3 - Limited physical assistance
4 - Other than two persons physical assist
5 - Two or more persons physical assist

***Toileting**

1 - Independent or Supervision only
2 - (Not a valid option for this question)
3 - Limited physical assistance
4 - Other than two persons physical assist
5 - Two or more persons physical assist

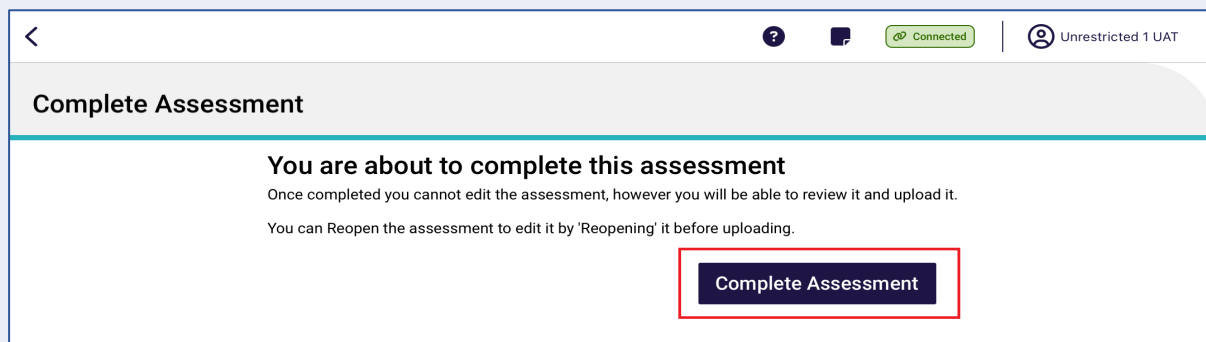
- If your input has contradicted a previous input in another tool, you will be shown the following warning. You will be able to choose to amend either the input that you have just created or the other contradicted input.

The screenshot shows the 'UAT Pitz RESI- HCP & STRC outlet' form for user 'Nia Sharma'. The progress bar indicates '91% complete'. A warning message is displayed: 'The following warning conditions have been found. Please review them before continuing. Transfers - Toilet'. The 'AM-FIM' section is active, showing 'Supervision' with a warning: 'Warning: Please review the FIM Transfer Toilet and Braden Scale Activity Scores as these may be inconsistent.' Below this, there are three sections: '* Toilet' with a scale from 1 to 7 (6 is selected), '* Tub or Shower' with a scale from 1 to 7 (3 is selected), and '* Locomotion'.

- Once all pages are complete (tick icons) and the progress bar is showing 100% completed, select **Complete** on the top right.

The screenshot shows the 'UAT Pitz RESI- HCP & STRC outlet' form for user 'Nia Sharma'. The progress bar now indicates '100% complete'. The 'Complete' button is highlighted in a red box. The 'Assessment Details' section is active, showing 'Care type' as 'Permanent', 'Assessment date' as '06/06/2024', and two questions: '* Was PPE supplied by your organisation used?' (No is selected) and '* Is the Client receiving care in a Memory Support Unit?' (No is selected). The 'Client details' section shows 'The resident has only one name' as 'No'.

4. Select **Complete Assessment** again to confirm.

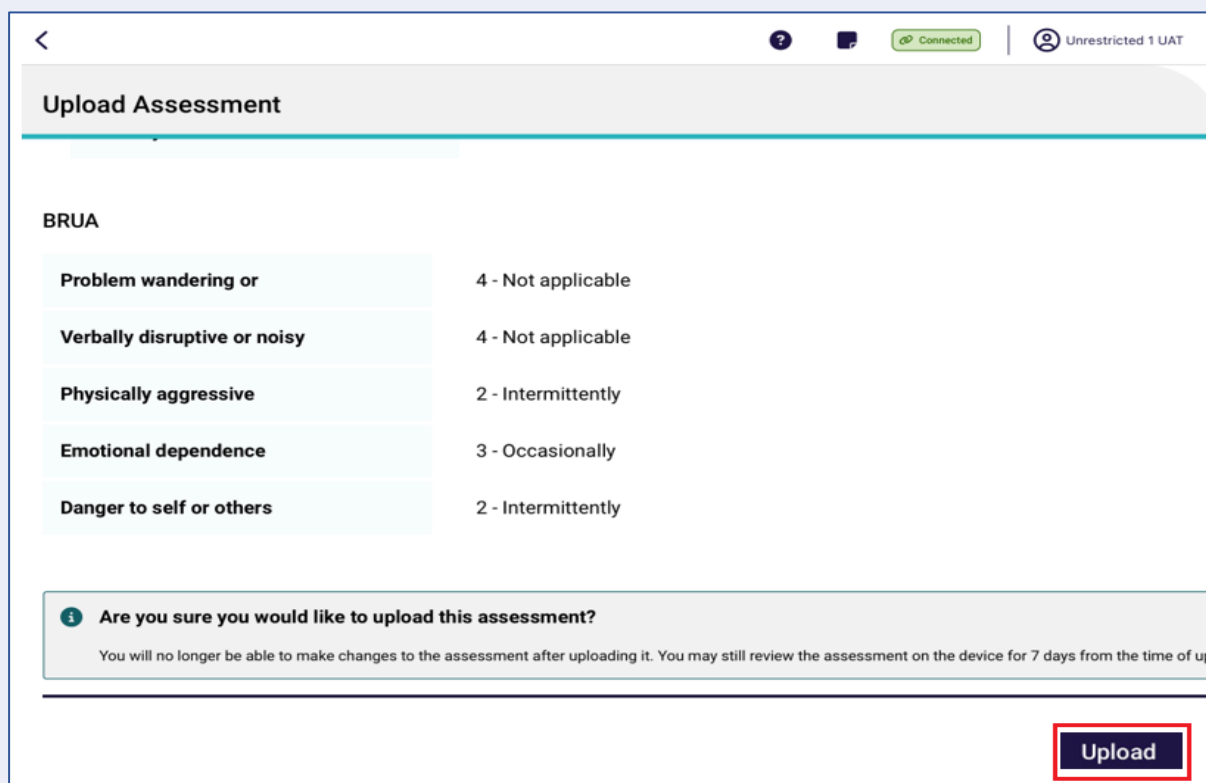


5. A summary of the assessment appears.

Scroll to the bottom and then select **Upload**.

The assessment will remain in the completed status until either the **Upload** button is pressed or automatically uploaded after 7 days.

After upload, the assessment will disappear from the **In-progress assessments** section of the main menu.



23.2 Re-opening a completed assessment

An assessment that has the status of **Completed** or **Uploaded** can be reopened, but only **Completed** assessments can be reopened for edits. Uploaded assessments can be reopened for view only.

1. To reopen a complete assessment, select the Facility, then select **Completed**. Select the assessment to reopen.

Connected | Unrestricted 1 UAT

Welcome Unrestricted 1 UAT

Referrals last synced 15:24 today

Facilities (AN-ACC)

Facility Name	Days Overdue	Not started	In progress	Completed
Edge Hill Orchards	372 days overdue	1	0	0
Gosling Creek Aged Care	277 days overdue	4	0	0
RFA Auto Facility	262 days overdue	2	0	0
UAT Pitz RESI- HCP & STRC outlet	248 days overdue	6	1	1

Sync
No uploads pending
Quality Assurance
Backup Assessment

! Assessments with a 100% progress completed indicator will still appear in the **In-progress assessment** section of the main menu. These assessments are technically complete but is not officially in the Completed status until the **Complete Assessment** button is selected.

Dashboard | UAT Pitz RESI- HCP & STRC outlet (6 Assessments) | Connected | Unrestricted 1 UAT

Filters 6 assessments, sorted by First Name A-Z

<p><u>AGAntwon UATHayes</u></p> <p>252 days overdue Completed</p> <p>Aged Care ID: AC23765274 Date of birth: 09/11/1940 Assessment type: Residential Permanent</p>	<p><u>AGLeonard UATLinnie</u></p> <p>252 days overdue Completed</p> <p>Aged Care ID: AC08129645 Date of birth: 08/12/1940 Assessment type: Residential Permanent</p>
<p><u>AGMarlee UATColt</u></p> <p>252 days overdue Not started</p> <p>Aged Care ID: AC34890376 Date of birth: 31/07/1941 Assessment type: Residential Permanent</p>	<p><u>Pridata UAT</u></p> <p>256 days overdue Urgent Not started</p> <p>Aged Care ID: AC98773435 Date of birth: 01/07/1924 Assessment type: Residential Permanent</p>

Sync Referrals
New Assessment
Quality Assurance
Upload 2 Completed
Backup 2 Assessments

2. The selected assessment displays. Select **Reopen**.

AGLeonard UATLinnie | Connected | Unrestricted 1 UAT

UAT Pitz RESI- HCP & STRC outlet AC08129645 100% complete

Reopen Upload More options

Identification and assessment details | Assessment Details | Palliative Care

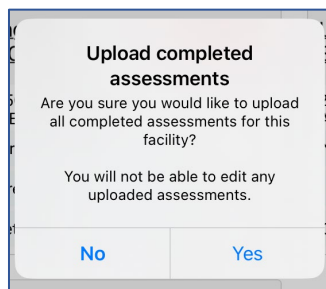
All fields marked with an asterisk (*) are required.

3. The completed assessment will be reopened for edits.

It will need to go through the process for [Completing an assessment](#) again.

23.3 Re-opening an uploaded assessment

! Once the assessment has been uploaded you are unable to reopen and edit the assessment.



23.4 Uploading Assessments

RAC funding assessors can upload assessments once they are complete.

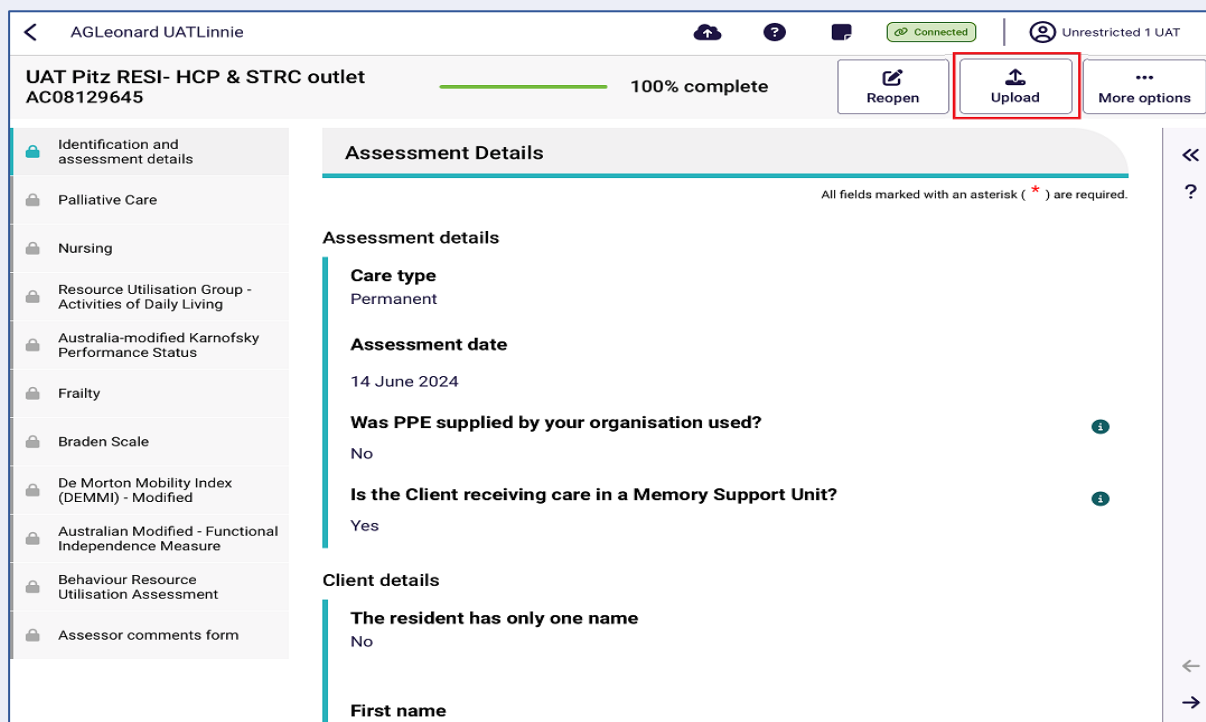
The assessment will remain in the completed status until either the **Upload** button is pressed or automatically uploaded after 7 days.

After upload, the assessment will disappear from the **In-progress assessments** section of the main menu and will move to the Uploaded section of the Facility's page.

! You must have an active internet connection to upload the assessment.

If you do not have an active internet connection, the completed assessment will be saved on your device for 7 days and uploaded when you enter an internet service area.

1. After completing the steps in [Completing an Assessment](#), a summary of the assessment appears. Scroll to the bottom and then select **Upload**.



AGLeonard UATLinnie

UAT Pitz RESI- HCP & STRC outlet AC08129645

100% complete

Reopen Upload More options

Assessment Details

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

Assessment details

Care type
Permanent

Assessment date
14 June 2024

Was PPE supplied by your organisation used?
No

Is the Client receiving care in a Memory Support Unit?
Yes

Client details

The resident has only one name
No

First name

2. After going to the Facility page and selecting **Completed**, all completed assessments can be uploaded at once by selecting **Upload [number] Completed**.

24. Removing Assessments and Clearing Assessment Data

- ! Removing an assessment from the device will permanently delete any assessment information recorded on that device.
- ! Completed but not yet uploaded assessments cannot be removed.
- ! Removing an uploaded assessment from your device does NOT remove the data from My Aged Care.

24.1 Removing an uploaded assessment

To remove an uploaded assessment:

1. Open the uploaded assessment that you wish to remove. See the [Find A Client](#) section for more details.
2. Select the **More options** button in the top right hand side.

UAT Pitz RESI- HCP & STRC outlet
AC67952275

100% complete

More options

Assessment Details

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

Assessment details

Care type
Permanent

Assessment date
6 June 2024

Was PPE supplied by your organisation used?
No

Is the Client receiving care in a Memory Support Unit?
No

Client details

The resident has only one name
No

First name

3. Select **Remove assessment** from the pop-up. This will NOT remove the assessment data from the department's system.

Select an option

Remove assessment

Share referral details

24.2 Removing an in-progress assessment

To remove an in-progress assessment:

1. Open the assessment that you wish to remove. Refer to the [Find A Client](#) section for more details.
2. Select the **More options** button in the top right corner of the app.

Pridata UAT

UAT Pitz RESI- HCP & STRC outlet
AC98773435

82% complete

More options

DEMMI

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

*Stand on toes

Unable 10 seconds

*Tandem stand with eyes closed

Unable 10 seconds

Walking

*Walking distance +/- gait aid

Unable 5 metres 10 metres 20 metres 50 metres

*Walking independence

Unable

Minimal assistance

3. Select **Remove assessment** from the **Select an option** pop-up.

Select an option

Clear page

Remove assessment

Reject referral

Share referral details

4. Select **Remove assessment** from the **Remove Assessment** pop up.

Remove Assessment

Are you sure you would like to remove the assessment from this device?

This cannot be undone.

Remove Assessment

Go back

5. The assessment will be removed. If you choose the same client again from the Facilities page, you will be prompted to start a new assessment. ALL data will have been removed.

24.3 Clear Uploaded and Not Started assessments

For not started or uploaded assessments, to clear them they will either require to be manually removed by following the steps set out in [Removing an uploaded assessment](#) or will automatically be removed 7 days after successfully uploading.

Are you sure you would like to upload this assessment?

You will no longer be able to make changes to the assessment after uploading it. You may still review the assessment on the device for 7 days from the time of upload.

24.4 Rejecting a Referral

RAC funding assessors may reject a referral if a Resident is not available to be assessed.

Please note that for self-referred assessments, you will not be able to reject the referral.

1. Go to the Resident's client card to display the Start Assessment screen. Then, select **Reject Referral**.

AGNorval UATKoelpin

You are about to start an assessment for AGNorval UATKoelpin (AC83537217, 18 Sept 1940, Male). This will put the assessment in-progress.

Start Assessment

Reject Referral

Is a quality assurance or training assessment also being conducted?

QUALITY ASSURANCE TRAINING

2. Select the reason for the rejection. Choose from **Client Deceased**, **Client Unavailable**, or **Other**. Please note that for **Residential Respite referrals** option of **Client has exited facility** will be available instead of **Client Unavailable**.

Reject AGNorval UATKoelpin's Referral

Are you sure you would like to reject this referral?
All in progress assessments for this referral will be cancelled.

Referral status reason*

Client Deceased

Client Unavailable

Other

Reject Referral



a) Client Deceased

Select the client's deceased date if known, then select **Reject Referral**.

The screenshot shows a mobile application interface for rejecting a referral. At the top, there is a navigation bar with a back arrow, a help icon, a profile icon, a 'Connected' status indicator, and the user name 'Unrestricted 1 UAT'. Below the navigation bar, the title 'Reject AGNorval UATKoelpin's Referral' is displayed. A warning message states: 'Are you sure you would like to reject this referral? All in progress assessments for this referral will be cancelled.' Underneath, the 'Referral status reason*' section has three options: 'Client Deceased' (highlighted in dark blue), 'Client Unavailable', and 'Other'. Below this is a 'Client Deceased Date (if known) *' field with a date picker icon. A yellow warning box contains the text: 'Cancelling this referral with the reason of Deceased will set the client record in MyAgedCare system to Deceased which will prevent future use of the record. You should only proceed with this action if you are confident that the referral is for a deceased individual.' At the bottom right, there is a 'Reject Referral' button, which is highlighted with a red box in the image.

b) Client Unavailable

Client unavailable should be selected if the client is currently unavailable for some reason, for example is in hospital but is expected to return to the service or facility at some point of time in the future. Select **Reject Referral**.

The screenshot shows the same mobile application interface as in part (a). The 'Referral status reason*' section now has 'Client Unavailable' highlighted in dark blue. The 'Client Deceased Date' field is no longer present. The 'Reject Referral' button at the bottom right is now a solid dark blue button.

c) Client has exited facility

This option is available for Residential Respite referrals only. Select **Reject Referral**. This option will transfer the referral to an assessment organisation at the client's registered home address.

< ? Connected Unrestricted 1 UAT

Reject MMO'Conner NDEve's Referral

i Are you sure you would like to reject this referral?
All in progress assessments for this referral will be cancelled.

Referral status reason*

- Client Deceased
- Client has exited facility**
- Other

Reject Referral

d) Other

If the assessment cannot be completed for any other reason, select **Other** and enter the reason in the textbox. You must enter a reason in **Rejection reason** before you will be able to reject the referral. Then, select **Reject Referral**.

An example of this would be if the resident has returned to their home in the community.

< ? Connected Unrestricted 1 UAT

Reject AGNorval UATKoelpin's Referral

i Are you sure you would like to reject this referral?
All in progress assessments for this referral will be cancelled.

Referral status reason*

- Client Deceased
- Client Unavailable
- Other**

Rejection reason*

Rejection reason comment here. 30/500

Reject Referral



25. Appendices

25.1 Sideloaded App for Organisations

Some organisations who would like to use the App on a Windows device outside the Windows App Store, via a manual installation process with a downloaded installation file known as sideloading. The app files for Windows are available to sideload onto a Windows device running Windows 10 or above. This is to allow for businesses that have a restricted IT environment to install the app without going through the [Microsoft Store](#).

Download the [sideloaded App](#) from the department's website.

My Aged Care recommends the use of the [Microsoft sideloading documentation](#) to install the app.

The suffix of the version number ends with a number one. For example: v30.0.0.1

The icon and splash screen for the Aged Care Assessor app appears as follows:



Upcoming releases

Unlike apps in the Microsoft Store, Apple App Store and Android Play Store which include automatic updates, Sideloaded apps have no automatic updates, therefore each sideload version update will require a manual installation.

The department will notify assessment organisations of a new release at least 2 weeks prior to the release of the application. They will also be notified when the new version is available and by what date all their users should be using the new version of the app.

Frequently Asked Questions

When do I need to install the new release of the app onto my organisation's devices?

The new version of the app should be installed on your users' devices within 1 week from the release of the new version. Once the new release of app has gone live, users will not be able to begin any new assessments until they have been upgraded to the latest version.

How will my organisation's sideloaded app users be supported by the department?

If you have installed the Aged Care Assessor App via the sideloading method, the department will continue to support users for issues within the application. We may refer you to contact your organisation's IT area if we believe the issue is related to your organisation's setup.

What happens if I don't upgrade my sideloaded app to a new version when it is released?

When a user doesn't accept the updated version of the App from the Microsoft Store, they will not be able to download or access any new referrals on their device. This same restriction will happen for users who have sideloaded the application and don't have the latest version available.

What should I do if I have any issues with using my sideloaded app?

Please email your organisation's IT area and include: description of the issue, screenshot/s of the issue, and description of where the issue is during your assessment or other use of the app.

25.2 End-of-Life Pathway

An assessor can choose to flag that a client is using the End-of-Life pathway.

This is available at the following times:

- during referral and self-referral
- before triage
- before assessment starts
- during the assessment
- before the support plan review starts
- during the support plan review.

For Transitioned Home Care Package clients that were flagged on the End-of-Life pathway but no longer requires it, assessors can revert this decision, back to the previous Transitioned Home Care Package classification.

To flag the End-of-life pathway:

1. Select the 'Flag End-Of-Life' option during referral.

Alternatively select the 'Flag End-of-life Pathway' button before triage, before assessment starts, and at the start of support plan review.

During Referral

Lam Mary's Details

Refer Lam Mary for Assessment

A Home Support Assessment referral will be created for the client.

Select an outlet for referral

GRAZIER AGED CARE - ACA - ACT

*** Select an assessment type:**

Home Support Assessment

Priority:

High

*** Reason for self referring:**

End-of-Life Pathway

Done

Remote Assessment
Homeless or at risk of
Vulnerable groups
End-of-Life Pathway

Before Triage

Lam Mary, AC37211299, born 28 December 1928, 96 Years.
Select an option to see more information.

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

Assessment Consent

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

The flag is also available when the IAT assessment is finalised and during the support plan review, by selecting **More Options** and then selecting **Flag End-of-life pathway**.

Jules Angelstar

Client Profile Assessment Support Plan Upload Quick notes More options

Client Profile

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

Title: Not Specified

* First name: Jules

Middle: [Empty]

* Last name: Angelstar

Assessment options: Remove Client from Device, Cancel Assessment, Flag End-of-Life Pathway

2. The End-of-Life Pathway page appears.

In here you can:

- select the tickbox to start the End-of-life pathway. This will also set the priority to High (Or Urgent for Support Plan reviews)
- attach the End of Life Form, and/or others
- validate End-of-life forms, and select the form verification status
- add details as free text.

Select **Confirm** to finalise the pathway.



! Assessors must verify End-of-life documentation before submitting the Support Plan or Support Plan Review for delegate decision.

End-of-Life pathway

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

* End-of-Life Pathway
This will flag End-of-Life Pathway and set the priority to High.

End-of-Life form verification?

Document reviewed - pending

* **End-of-Life Details**

EOL

3 of 255

End-of-Life form

You can add attachments up to 5 MB

3. Assessors can also attach End-of-life documentation at the **Attachments** page of the Client Record.

Select the **Add an attachment** button.

There are two types of attachments available: End of Life Form, and End of Life – Other.

When attached successfully, go to the client's Attachments screen, then to the attachments section, to view them.

Younger Bob

Client Profile Assessment Support Plan Upload Quick notes More options

Attachments

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

You can add attachments up to 5 MB

Assessment Attachments - 0 Files

State	Attachment name	Expiry	Type

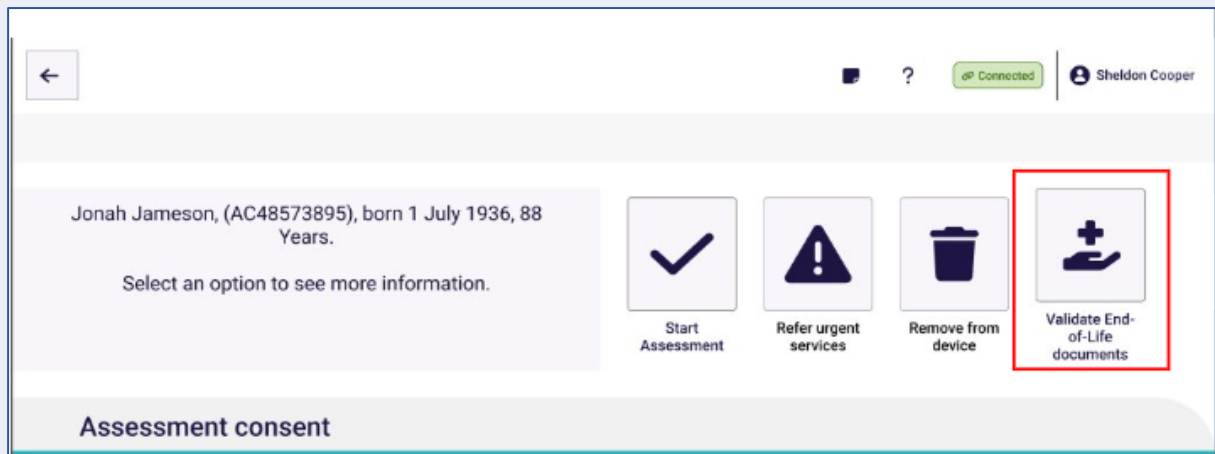
Other Attachments - 1 Files

State	Attachment name	Expiry	Type
Unavailable	EOL.docx	-	End of Life Form

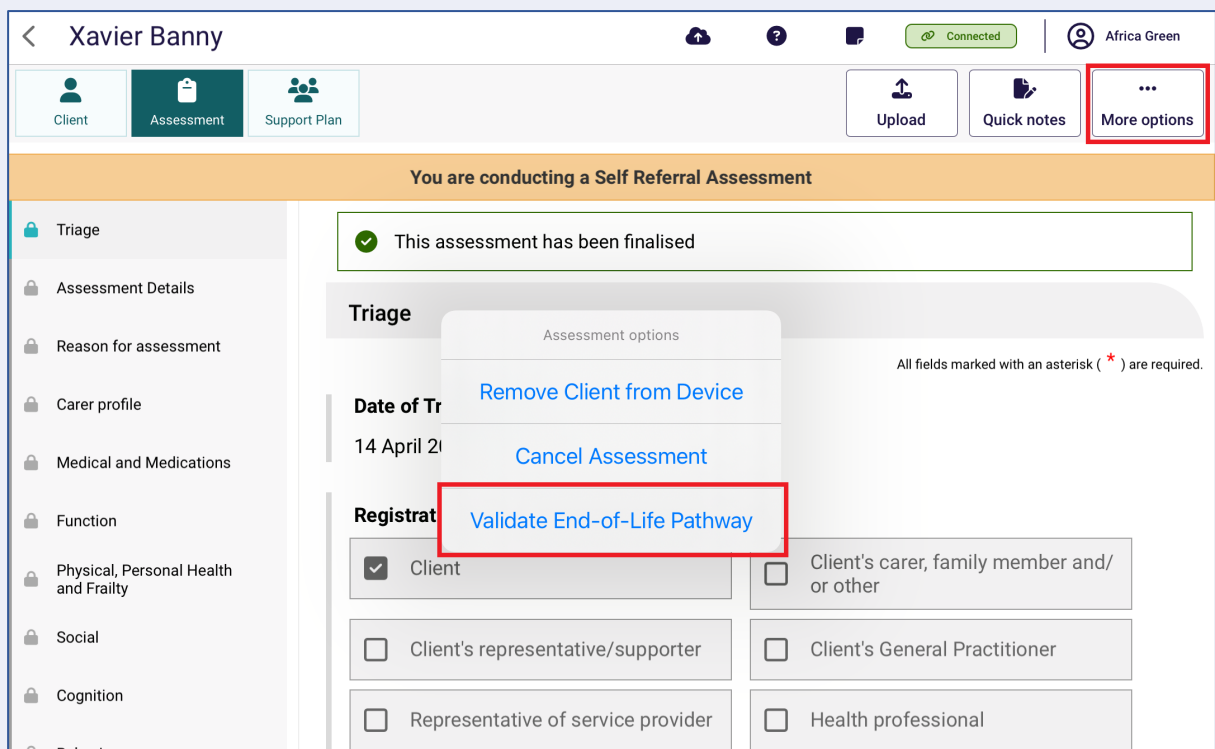
4. Assessors can also validate End-of-life documentation at the following times:

- before triage
- before assessment starts
- during the support plan
- during support plan review.

For before triage or before assessment starting, validate by selecting the **Validate End-of-Life documents** button.



If the IAT assessment is finalised or you are during the support plan review, you can select **More Options**, then select **Validate End-of-Life Pathway**.



- Once the End-of-Life pathway is finalised, the assessor's dashboard will show an **End of life** badge.

The dashboard shows a welcome message for John Wick and a summary of assessment outcomes. The 'Assessment outlet' section is divided into two columns: 'Jim's Assessment Outlet' and 'Careful Assessments'. A red box highlights the 'End of Life' badge in the 'Jim's Assessment Outlet' column.

Jim's Assessment Outlet		Careful Assessments	
Triage not started	0	Triage not started	2
Urgent Services Pending Triage	0	Urgent Services Pending Triage	0
Triage In Progress	1	Triage In Progress	3
Assessment Not Started	3	Assessment Not Started	1
Assessment In Progress	2	Assessment In Progress	0
SPR In Progress	1	SPR In Progress	0
SPR Not Started	0	SPR Not Started	1

- You can use the 'End of life' keyword whilst searching for clients and assessments.

There will be an **End of Life** badge associated with the Client Record. All End-Of-Life flagged assessments and support plan reviews have a High priority.

The search results page shows a list of assessments filtered by 'Client Last Name'. The 'Keyword' field is highlighted with a red box, and the 'End of Life' and 'High priority' badges are highlighted in red boxes for the first result.

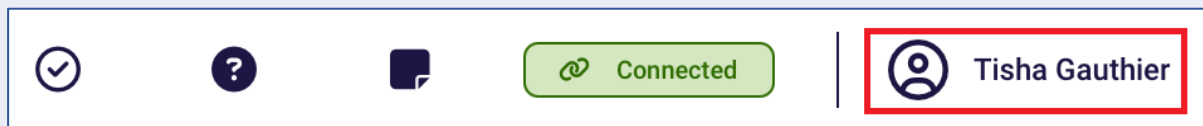
Order	Status	Priority	Assessment type
Client Last Name			

Client Name	Badges	Assessment Details
Jeff Goldblum	End of Life, High priority	Aged Care ID: AC123456789 Assessment type: Comprehensive Assessment Assessment status: In Progress Finalised Support Plan due by: 18/9/2023 (Due in 10 days)
Charles Mercy	FNAO, End of Life, High priority	Aged Care ID: AC24683579 Assessment type: Home Support Assessment Assessment status: Triage In Progress Completed Triage Due by: 21/9/2023 (Due in 12 days)
Jessica Jones	End of Life, High priority	Aged Care ID: AC04579375 Assessment type: Comprehensive Assessment Assessment status: Triage Completed Finalised Support Plan due by: 10/9/2023 (2 days overdue)

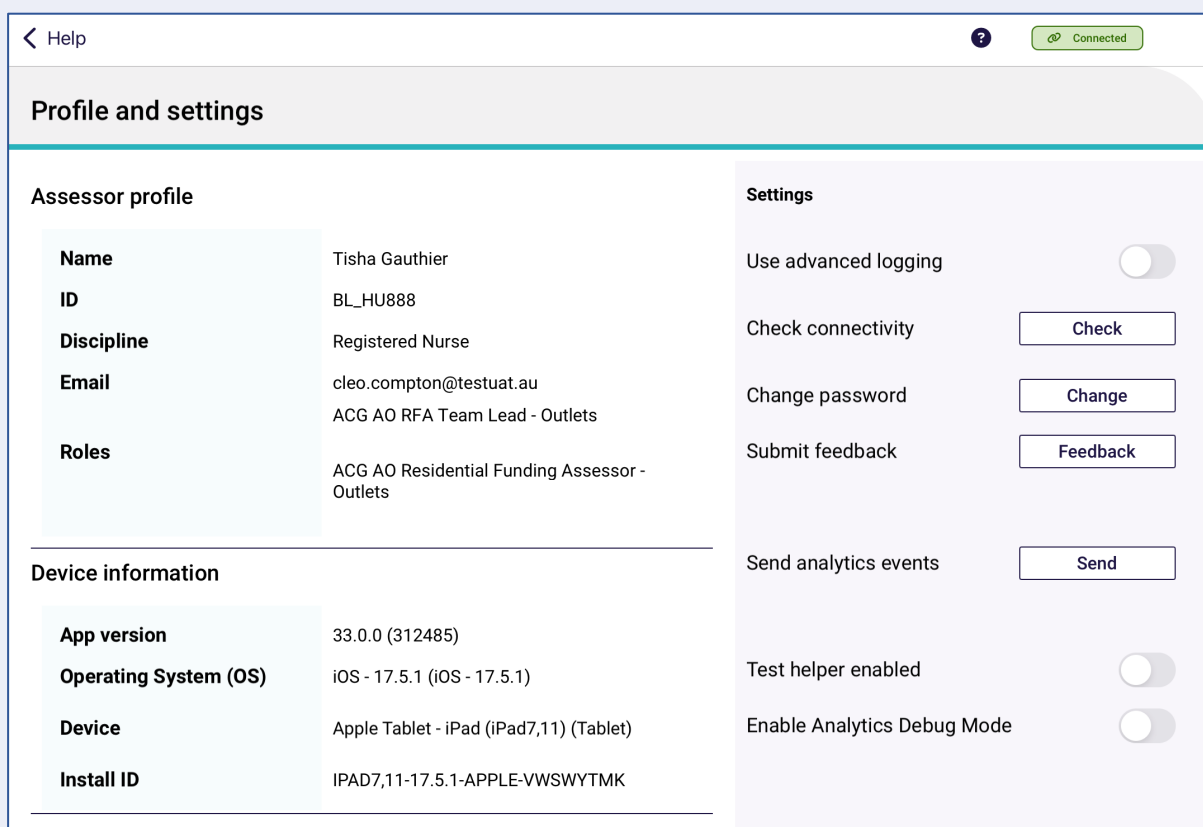
25.3 Troubleshooting and diagnostics

The troubleshooting and diagnostics functionality assists the My Aged Care service provider and assessor helpline with diagnosis and resolution of issues in coordination with the support teams in the Department of Health, Disability and Ageing.

These functions are accessed from the **Profile** icon on top of the navigation menu.



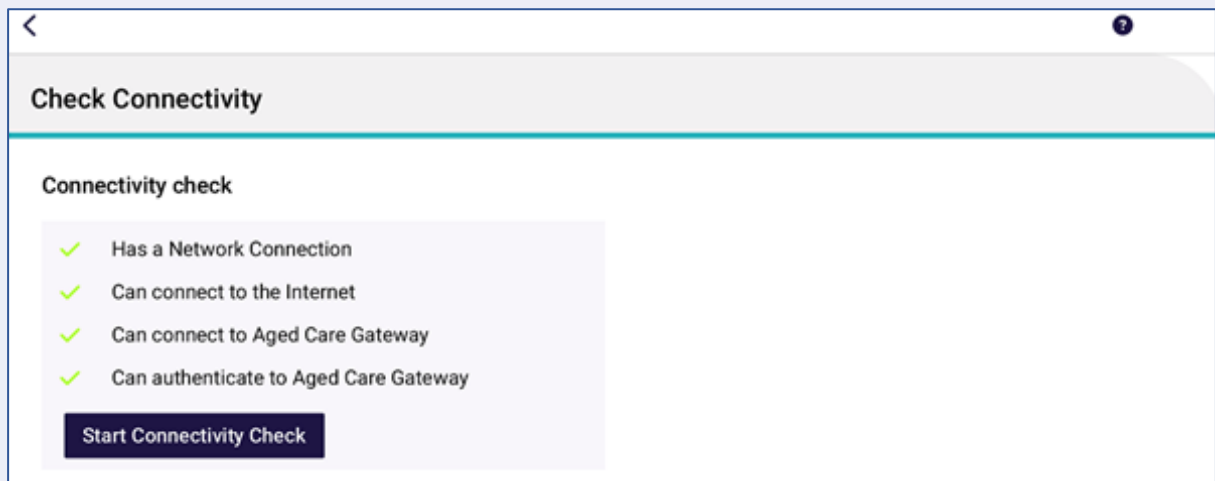
Information about the current downloaded version of the Aged Care Assessor App is displayed, and assessors can also **Check connectivity**, Change password, Use advanced logging or **Submit feedback** from this screen.



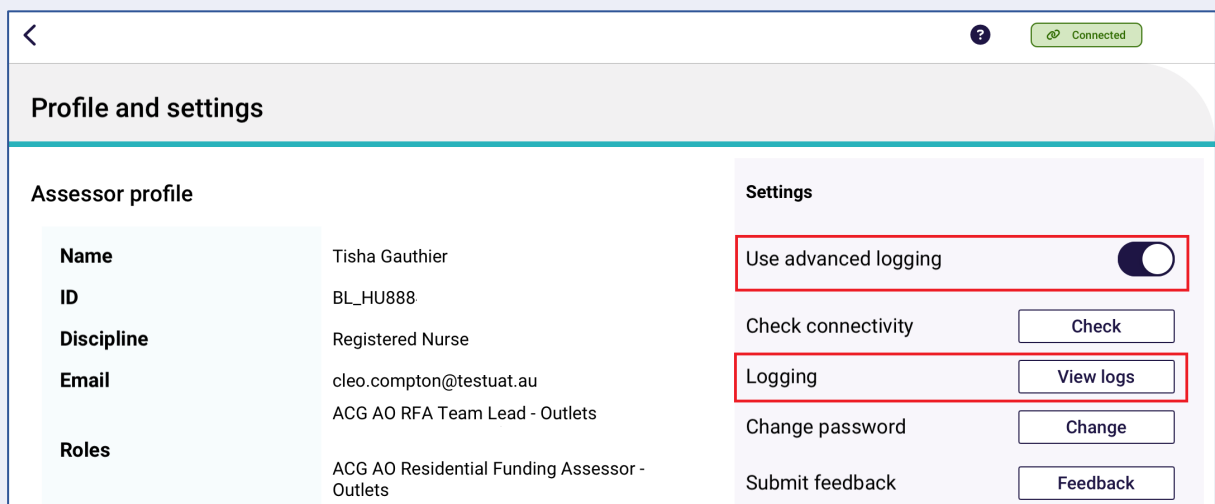
If you experience connection issues whilst using the App, you can check for issues by selecting **Check connectivity**.

Any connection issues will be displayed. There are also quick suggestions provided to help with connectivity issues.

Proxy settings can also be updated if it is a requirement from your organisation.



If you experience technical issues whilst using the App, you can choose to share your App device logs and diagnostics. This will assist the support teams to more easily identify, analyse, diagnose and resolve any issues. To do so, toggle 'Use Advanced Logging'. This will display the 'View Logs' button.



The logs contain detailed information regarding the specific problem, and traceable steps that have been taken to reach the problem point. This information will be able to be accessed by the department for diagnosis.

