



My Aged Care Assessor Portal - Organisation Administrator User Guide

Table of contents

- 1. Background and Overview of the Assessor Portal..... 2
 - 1.1 Purpose of the Guide..... 2
 - 1.2 Privacy Requirements..... 2
 - 1.3 Introduction to Using the Assessor Portal 3
 - 1.4 How and when to direct people to My Aged Care..... 4
- 2. Assessor Portal Access 4
- 3. Assessment Organisation Configuration in the Assessor Portal..... 4
 - 3.1 Overview 4
 - 3.2 Activating Outlets..... 6
 - 3.3 Staff Roles 7
 - 3.4 Homepage Views by Role Type 7
 - 3.4.1 Administrator Homepage..... 8
 - 3.4.2 Team Leader Homepage..... 8
 - 3.4.3 Needs assessor Homepage 9
 - 3.4.4 Triage Delegate Homepage 10
 - 3.4.5 Assessment Delegate Homepage 10
 - 3.4.6 Assessment Delegate Support Homepage 11
 - 3.4.7 Residential Funding Assessor Functions 12
 - 3.4.8 Residential Funding Team Lead Functions..... 13
- 4. Key Functions by Role Type..... 13
 - 4.1 Creating New Staff Accounts and Assigning Roles 16
 - 4.2 Deactivate a Staff Account 19
 - 4.3 Removing and reactivating a Staff Account 20
 - 4.4 Edit a Staff Account 22
 - 4.5 Find A Service Provider 24
 - 4.6 End of Month (EOM) Reporting 26

1. Background and Overview of the Assessor Portal

1.1 Purpose of the Guide

The My Aged Care Organisation Administrator User Guide outlines how assessment organisation administrators as part of the Single Assessment System interact with the My Aged Care assessor portal (the assessor portal).

The Administrator User Guide is for assessment organisations that conduct aged care needs assessments and/or residential aged care funding assessments.

The Administrator User Guide provides an overview of the portal and describes the functions that an individual with the Administrator role in the assessor portal can perform. This includes:

- Managing outlet information
- Creating and maintaining staff accounts
- Requesting changes to contractual information.

The Administrator User Guide does not cover:

- Detailed instructions on how to set up organisations in the Relationship Authorisation Manager, which can be found on the [RAM website](#).
- Detailed instructions on functions that an individual with the Team Leader, Assessor, Delegate or Delegate support role in the assessor portal can perform, which can be found on the Department of Health, Disability and Ageing's [My Aged Care - Assessor Portal Resources](#) webpage.
- For detailed instructions on functions that residential funding assessors perform, refer to the dedicated [Aged Care Assessor Application User Guide](#).

1.2 Privacy Requirements

Assessment organisations are required to comply with the legislative requirements under the *Privacy Act 1988* (Privacy Act), including the Australian Privacy Principles (APPs) when handling personal information in the assessor portal.

The Privacy Act regulates the handling of personal information about individuals, including the collection, use, storage and disclosure of personal information, and access to and correction of that information.

Aged care needs assessors are also required to comply with Section 534 of the *Aged Care Act 2024* (Aged Care Act) when using the assessor portal.

1.3 Introduction to Using the Assessor Portal

The assessor portal is used to:

- Create and manage staff records
- Activating the Aged Care Assessor App
- Manage referrals for assessments issued by the My Aged Care contact centre, Aged Care Specialist Officers, through the My Aged Care website or via the General Practitioner (GP) e-Referral form
- Create, access and update client records, including setting up supporters and others in the client's support network
- Conduct Triage and assessments using the Integrated Assessment Tool (IAT)
- Develop client support plans
- Support Delegation processes (after home support and comprehensive assessments)
- Refer clients for aged care services or further assessment
- View the progress of Residential Aged Care (RAC) Funding Assessments
- Access forms and reports
- View and manage tasks and notifications, including from other My Aged Care portals
- Find a Service Provider and view their information.

Assessment organisations can also use the offline Aged Care Assessor App or a printed version of the IAT to support aged care needs assessments conducted in circumstances where the assessor does not have access to the internet.

For further information about the Aged Care Assessor App please refer to the [Aged Care Assessor Application User Guide](#).

The printed version of the IAT can be downloaded from the Reports and documents tab in the assessor portal.

! myID is the primary login option for assessors to securely access and use the assessor portal.

To access the assessor portal, staff must have an individual myID and be authorised to act on behalf of their organisation through the [Relationship Authorisation Manager \(RAM\)](#) service.

VANguard Federated Authentication Service (VANguard FAS) is an alternative login option for organisations with corporate network structure that includes a Single Sign On System (e.g. Active Directory Federation Service).

For more information regarding accessing the assessor portal please visit [Logging in to the Aged Care Systems](#).

1.4 How and when to direct people to My Aged Care

To access government funded aged care services, a person must have a client record on the My Aged Care system. Clients can create their own My Aged Care record. The My Aged Care contact centre, Aged Care Specialist Officers (ACSOs) and assessors can help create client records for people seeking aged care services.

Aged care needs assessors (needs assessors) and RAC funding assessors can register clients in My Aged Care if approached and the client does not have a client record.

Assessment organisations cannot receive assessment referrals for a client not registered in My Aged Care. This could occur in a variety of circumstances. For example, a needs assessor is in a client's home undertaking an assessment, and they determine that their partner, who is not registered with My Aged Care, also requires an assessment.

Needs assessors and RAC funding assessors can register and self-refer clients for assessment in the assessor portal.

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

2. Assessor Portal Access

To access the assessor portal, each staff member must have a My Aged Care portal user account linked to a supported third-party authentication service.

For more information regarding setting up users and logging into the system please refer to [Logging in to the Aged Care Systems](#).

3. Assessment Organisation Configuration in the Assessor Portal

People with the Organisation Administrator role in the assessor portal are responsible for ensuring that the information about the assessment services their organisation delivers is accurate.

3.1 Overview

! The department will create and manage outlets on behalf of Assessment Organisations. It is recommended that you contact the department for any changes to your assessment organisation structure.

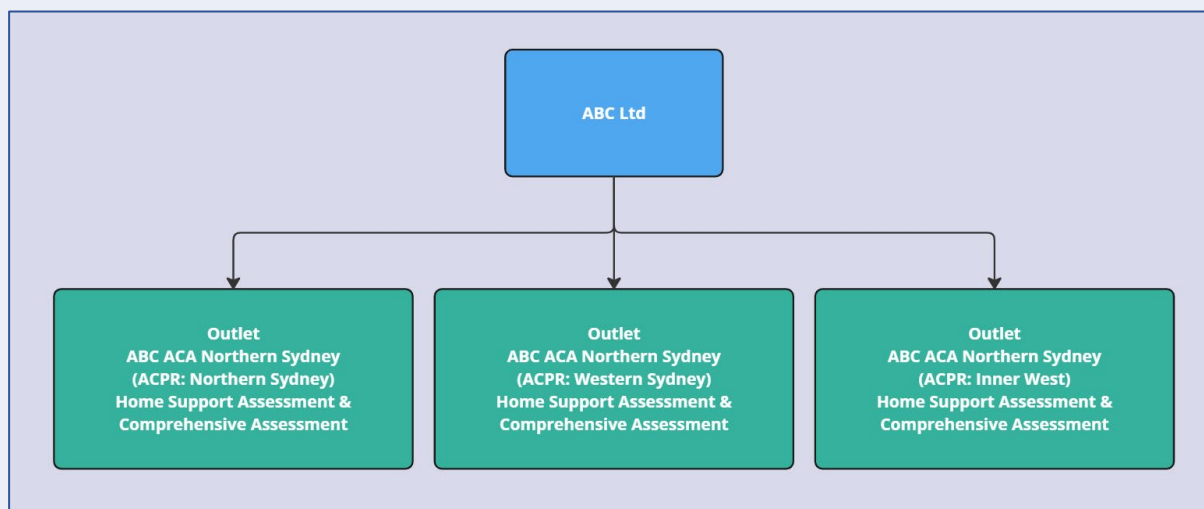
Multiple Aged Care Planning Regions (ACPR) make up a designated Service Area.

For example, if an organisation operates in Service Area - NSW 1 - they will be responsible for three outlets (Northern Sydney, Western Sydney and Inner West) reflecting the three ACPRs that are in the NSW 1 make up the relevant Service Area.

Following are the examples of an organisation structure in My Aged Care.

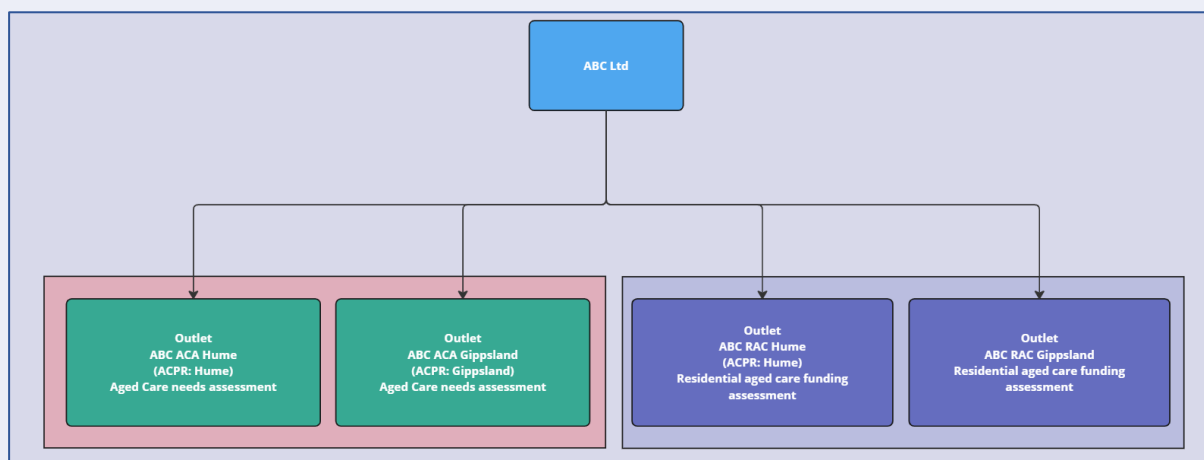
Example 1: If an organisation called ABC Ltd. providing Aged Care needs assessment (Home Support Assessment & Comprehensive Assessment) operates in the Service Area - NSW 1 - they will have three outlets (Northern Sydney, Western Sydney and Inner West) reflecting the ACPRs (Aged Care Planning Regions) that make up that Service Area as depicted in the image on the following page.

An organisation with three outlets



Example 2: If an organisation called ABC Ltd. providing Aged Care needs assessment (Home Support Assessment & Comprehensive Assessment) and Residential aged care funding assessment operates in the Service Area - VIC 4 - they will have four outlets with two outlets for Aged Care needs assessment (Home Support Assessment & Comprehensive Assessment) and two outlets for Residential aged care assessment services (Hume and Gippsland) reflecting the ACPRs (Aged Care Planning Regions) that make up that Service Area as depicted in the image below.

An organisation with 2 Aged Care needs assessment outlets and 2 Residential aged care assessment outlets



Outlet name: The department will establish consistent naming for the outlets. The organisation administrator should not change the outlet names.

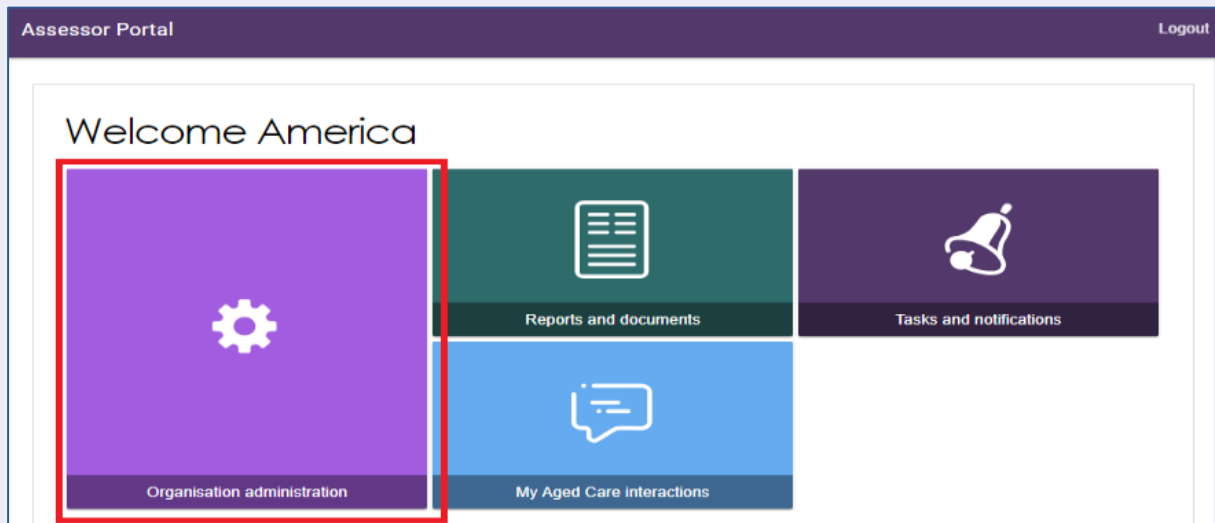
One Outlet per ACPR with assessment services for aged care needs assessments (ACA) i.e. (home support and comprehensive assessments): "Organisation name - ACA - ACPR region".

One Outlet per ACPR with assessment services for Residential aged care funding Assessments (RAC): "Organisation name - RAC - ACPR region".

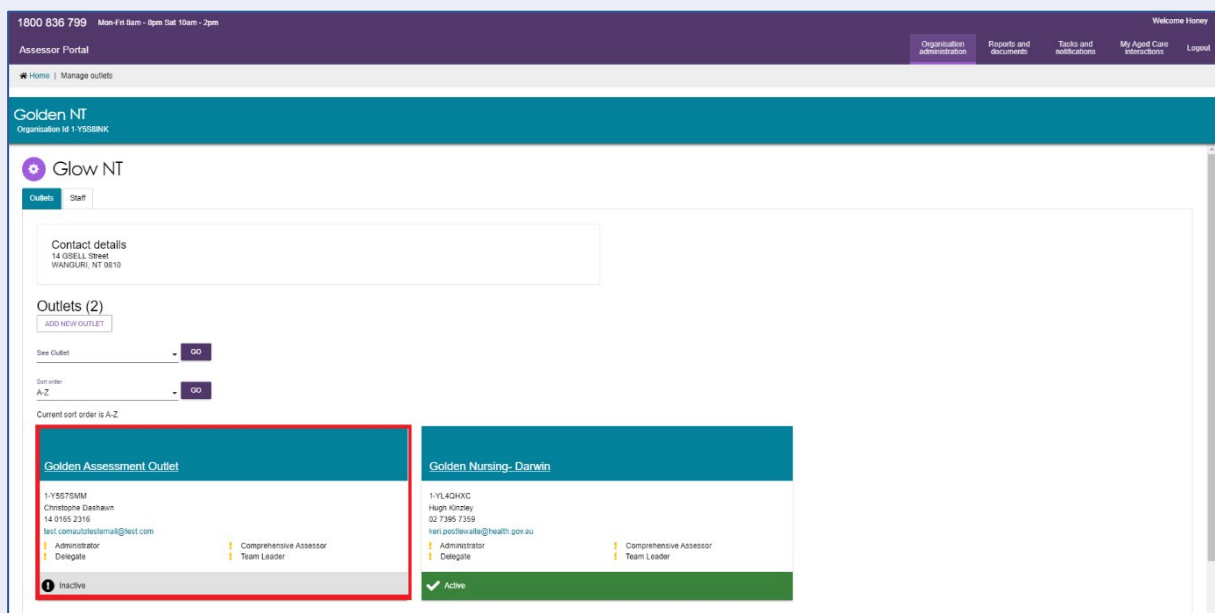
3.2 Activating Outlets

Follow these steps to activate an outlet:

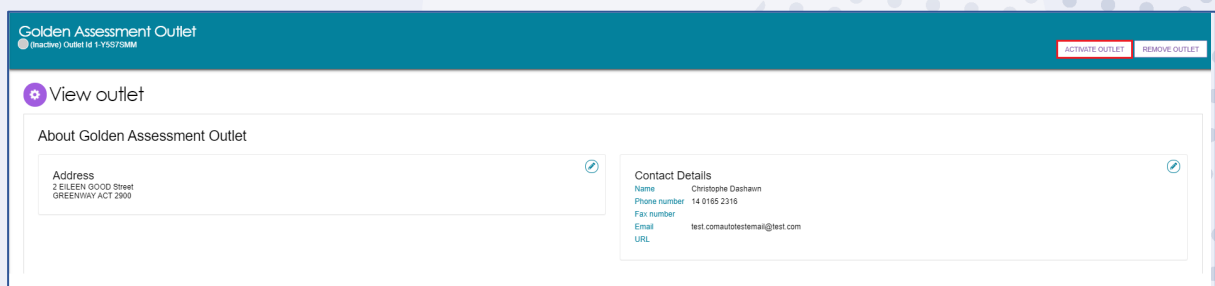
1. From the homepage, select **Organisation administration**.

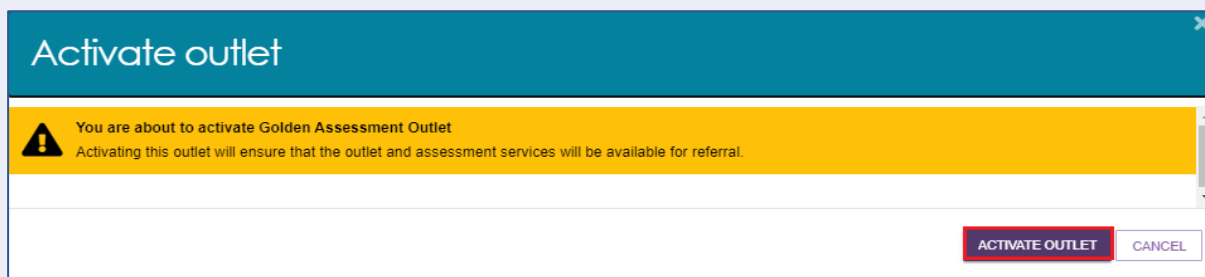


2. Your inactive outlet is displayed. To activate an outlet, select the name of the outlet on the **Outlet card**.

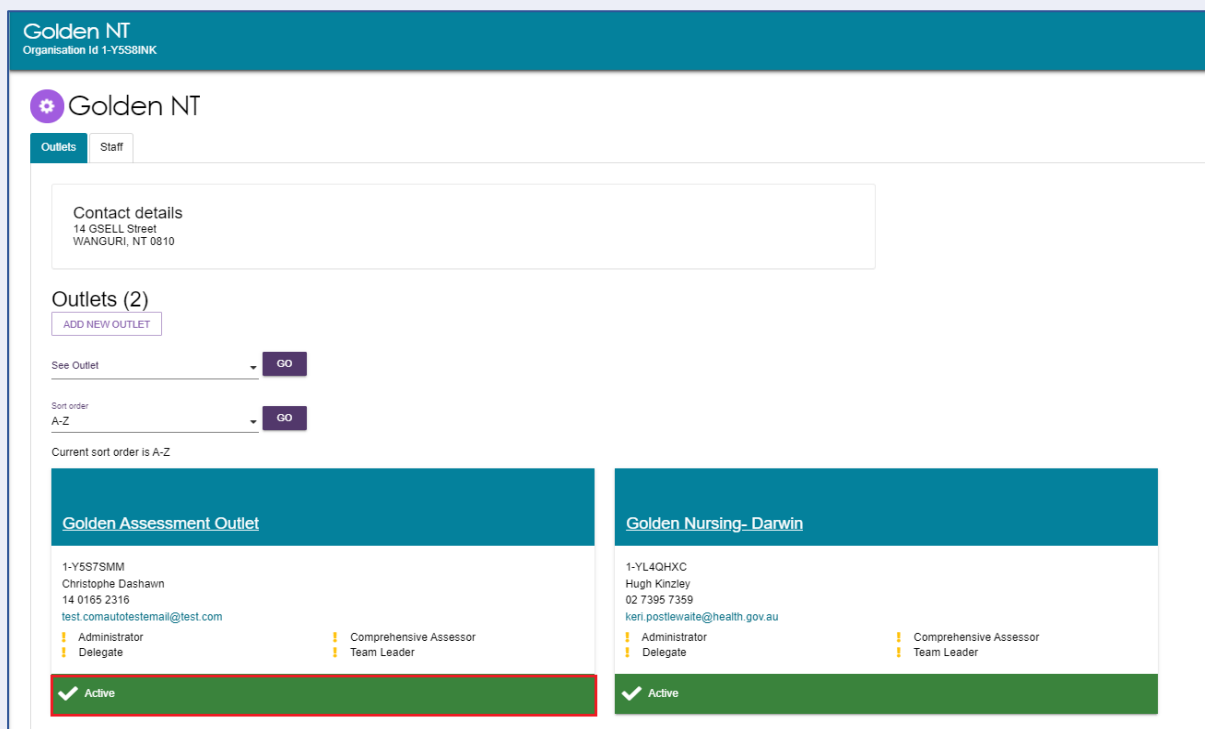


3. Select **ACTIVATE OUTLET** and then again at the warning pop-up.





Your outlet is now active. This can be seen on the View outlet page, and the Outlet administration page. Your information will be displayed in the service finders on the My Aged Care website and contact centre staff can send referrals for assessment.



3.3 Staff Roles

Refer to section *Nominating An Organisation Administrator in Aged Care Systems* in the [Logging in to Aged Care Systems](#) guide for more details.

The organisation administrator will be responsible for assigning roles to other staff. This can include assigning other staff the administrator role to help set up and maintain information about your organisation in the assessor portal.

Roles should be assigned in accordance with the duties the person performs within your organisation, and with completion of all required training.

! If you are assigned more than one role, this access will apply across all outlets you have been granted access to in the assessor portal.

3.4 Homepage Views by Role Type

The options displayed on the assessor portal homepage vary depending on your role(s).

If you are assigned more than one role in the assessor portal, you will see the functions for all the roles you are assigned on your homepage.

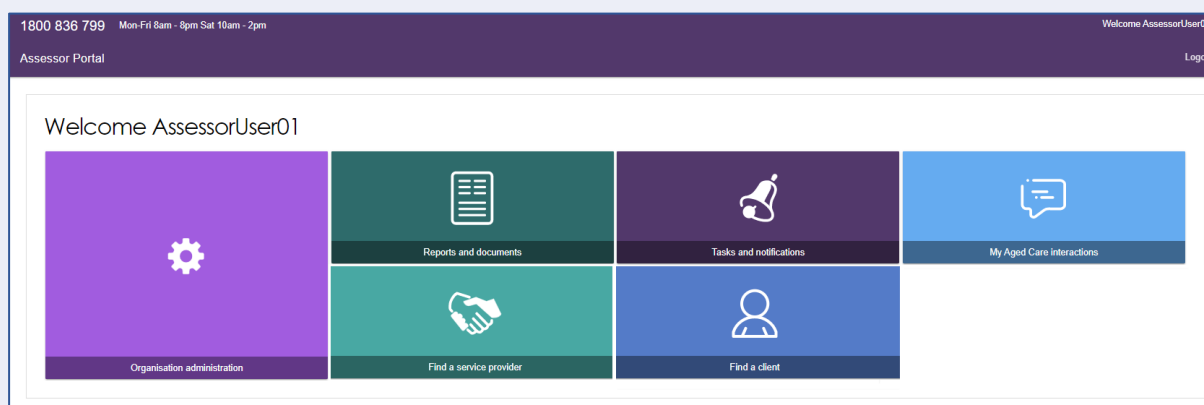
3.4.1 Administrator Homepage

People assigned an Administrator role at an organisation level can view and manage information for the entire organisation in the portal.

People assigned an Administrator role for one or more outlet(s) in the organisation will only be able to view and manage information for the outlet(s) they have been assigned.

If you log in to the assessor portal as an Administrator, you will see the following tiles on your homepage:

- Organisation administration
- Reports and documents
- Find a service provider (will not display for residential funding assessment organisations)
- Find a client (will not display for residential funding assessment organisations)
- Tasks and notifications
- My Aged Care interactions.

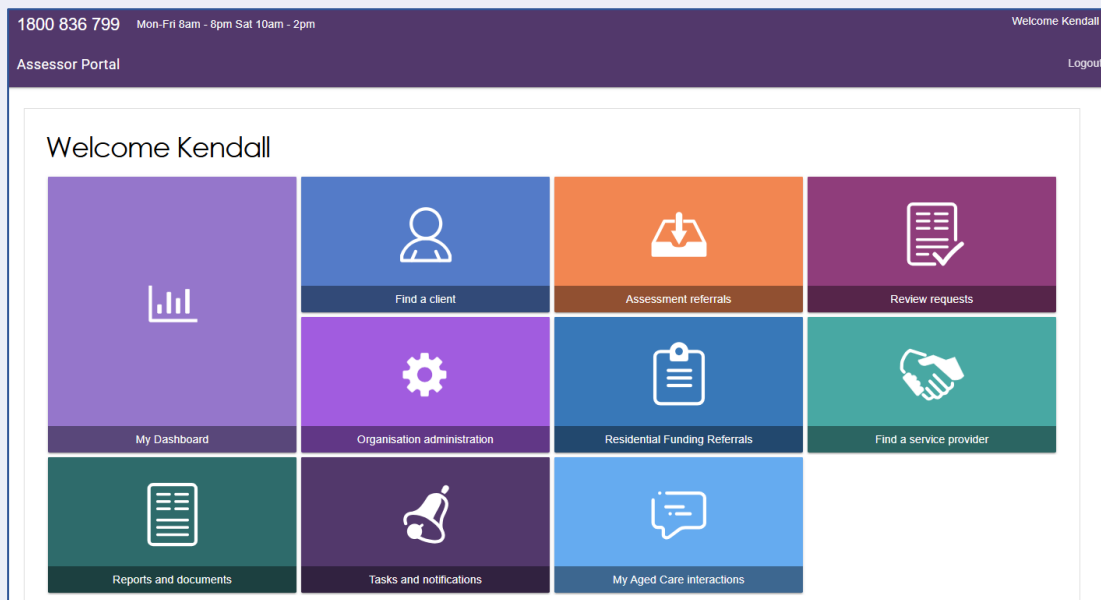


3.4.2 Team Leader Homepage

People assigned the Team Leader role in the assessor portal are responsible for managing referrals for assessment(s) and assigning assessment reviews.

If you log in to the assessor portal as a Team Leader, you will see the following tiles on your homepage:

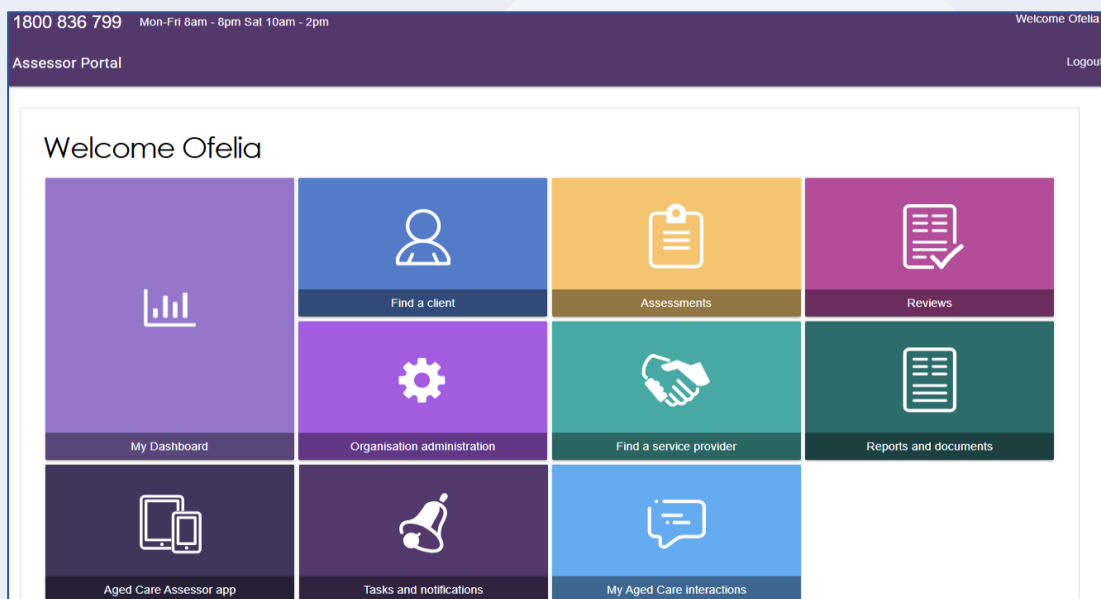
- My Dashboard
- Find a client
- Assessment referrals including Residential Funding Referrals
- Review Requests
- Organisation administration
- Find a service provider
- Reports and documents
- Tasks and notifications
- My Aged Care interactions.



3.4.3 Needs assessor Homepage

People assigned a needs assessor role are responsible for registering new clients and conducting client assessments. If you log in to the assessor portal as a needs assessor, you will see the following tiles on your homepage:

- My Dashboard
- Find a client
- Assessments
- Reviews
- Find a service provider
- Reports and documents
- Aged Care Assessor App
- Tasks and notifications
- My Aged Care interactions.



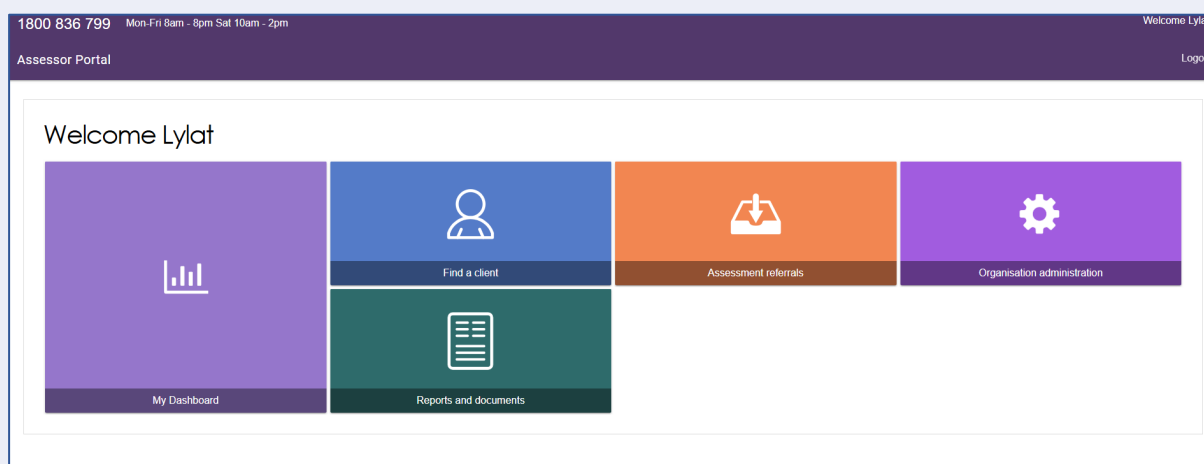
3.4.4 Triage Delegate Homepage

! Delegate roles cannot be assigned by Organisation Administrators and instead require needs assessors, Team Leaders or Operational Managers to submit an application.

For more information regarding the application for delegate roles please refer to [My Aged Care Assessor Portal User Guide 12 – Managing delegate roles](#).

People assigned a Triage Delegate role in the assessor portal will be able to complete triage. If you log into the assessor portal as a Triage Delegate you will be able to see the following tiles on your homepage:

- My Dashboard
- Find a client
- Assessment referrals
- Organisation administration
- Reports and documents.



3.4.5 Assessment Delegate Homepage

! Delegate roles cannot be assigned by organisation administrators and instead require needs assessors, Team Leaders or Operational Managers to submit an application.

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

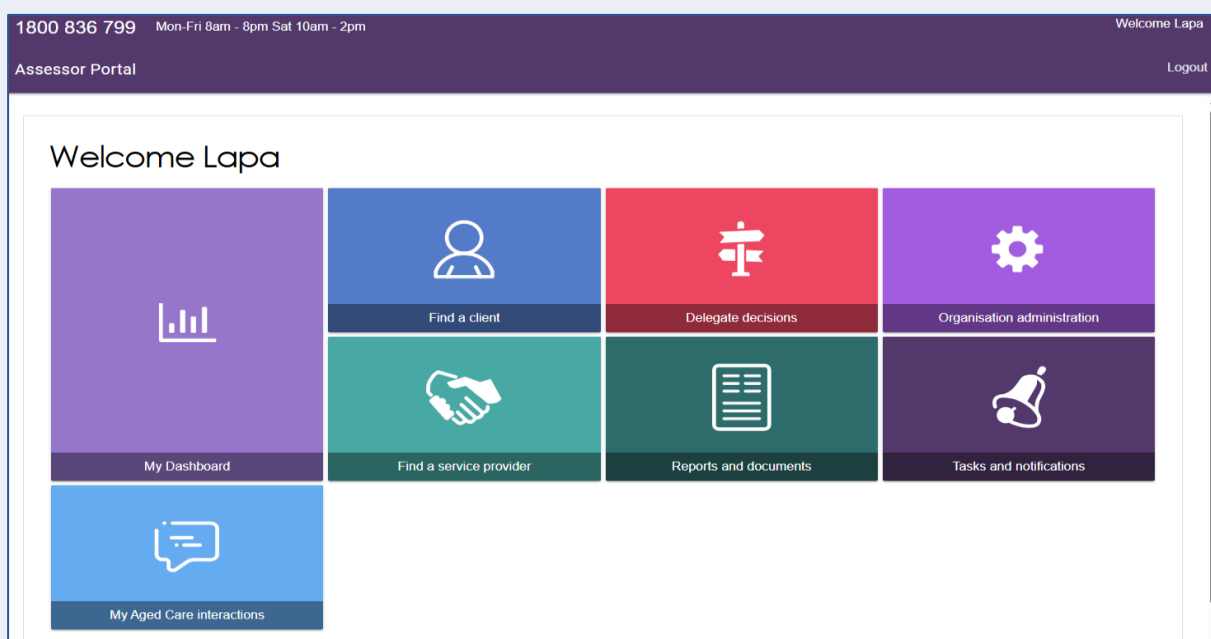
To understand **Assessment Delegate changes**, refer to 'Chapter 7: Delegations and Approvals under the Act' of the [My Aged Care Assessment Manual](#).

For more information regarding the application for delegate roles please refer to [My Aged Care Assessor Portal User Guide 12 – Managing delegate roles](#).

People assigned an assessment delegate role in the assessor portal will be able to make Delegate decisions for services requiring approval under the *Aged Care Act*.

If you log into the assessor portal as an assessment delegate, you will see the following tiles on your homepage:

- Delegate decisions
- Find a client
- Find a service provider
- Reports and documents
- Tasks and notifications
- Organisation administration
- My Aged Care interactions.

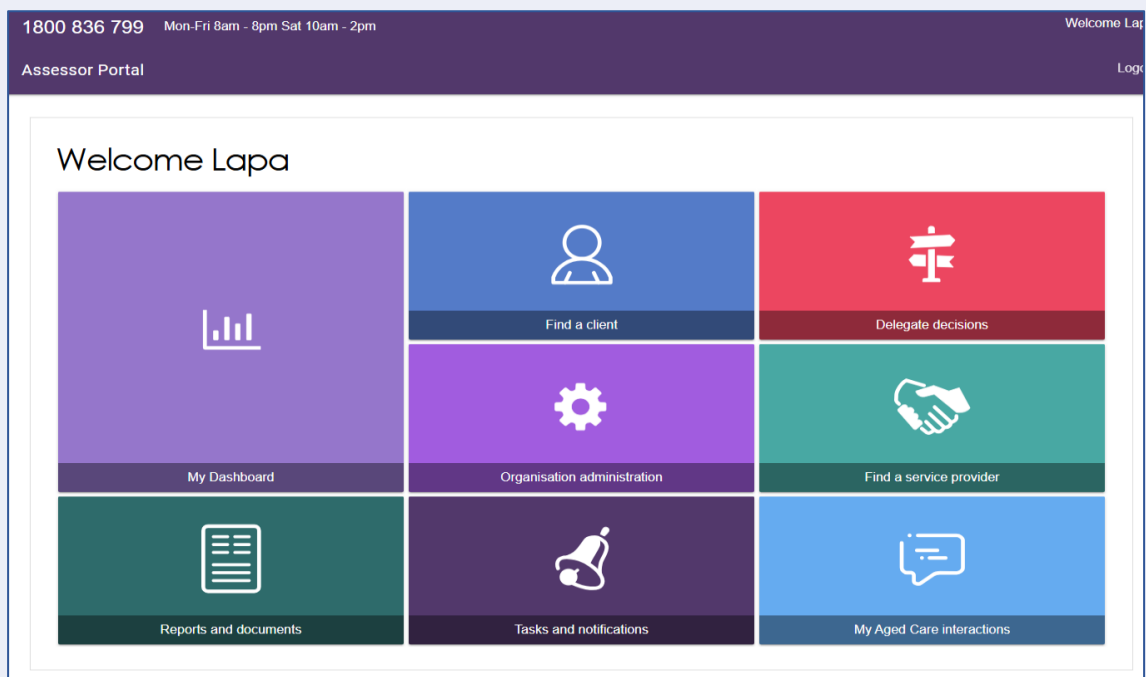


3.4.6 Assessment Delegate Support Homepage

People assigned the Assessment Delegate Support role in the assessor portal can support the Delegate by generating, uploading and/or printing Notice of Decisions (Approval/Non-Approval Letters) and Referral Code Letters. They can also print client information in support plans and client records.

If you log in to the assessor portal as an Assessment Delegate Support, you will see the following tiles in your homepage:

- Delegate decisions
- Find a client
- Organisation administration
- Find a service provider
- Reports and documents
- Tasks and notifications
- My Aged Care interactions.

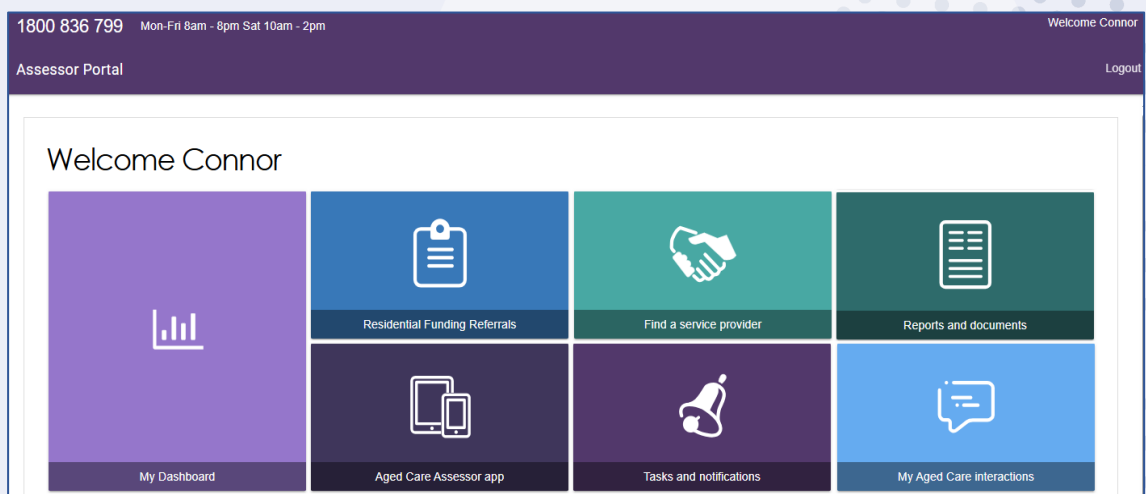


3.4.7 Residential Funding Assessor Functions

People assigned the *Residential Funding Assessor* role will have the below view in the My Aged Care Assessor Portal. From here, they can view the assessment referrals they have been assigned to undertake, and the assigned referrals that have been closed. They can also accept and assign referrals.

If you log in to the assessor portal as a RAC funding assessor, you will see the following tiles in your homepage:

- Find a client
- Residential Funding Referrals
- Find a service provider
- Reports and documents
- Aged Care Assessor app
- Tasks and notifications
- My Aged Care interactions.



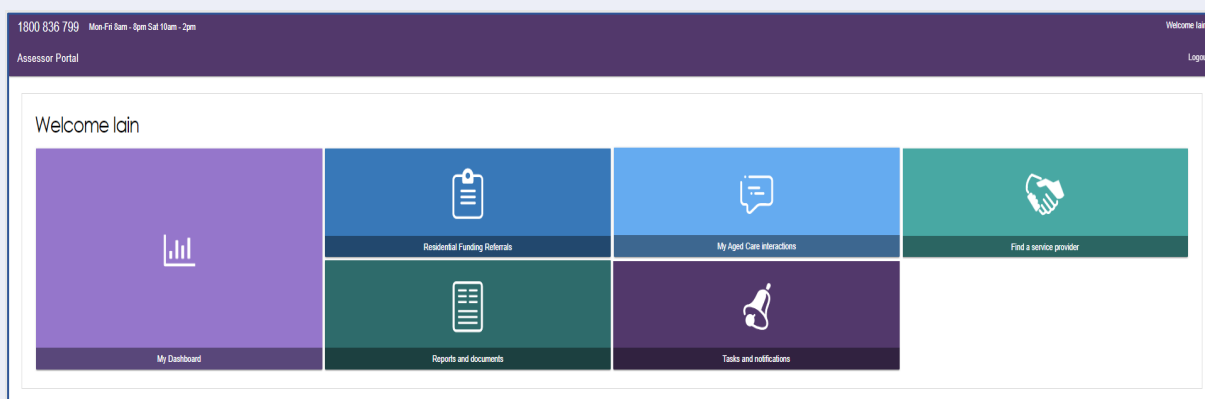
3.4.8 Residential Funding Team Lead Functions

Residential Funding team leads will have the following view in the My Aged Care Assessor Portal.

From here team leads are able to view Residential Funding Referrals, generate reports and documents, find service providers and conduct other functions in their role.

If you log in to the assessor portal as a RAC funding assessor, you will see the following tiles in your homepage:

- Residential Funding Referrals
- My Aged Care interactions
- Find a service provider
- Reports and documents
- Tasks and notifications.



4. Key Functions by Role Type

Administrators will create and maintain staff accounts in the assessor portal.

Staff can be allocated more than one role (Administrator, Team Leader, Needs assessor, Residential Funding Assessors, Residential Funding Assessor (Restricted), Triage Delegate, Clinical Assessment Delegate, Non-clinical Assessment Delegate, and Assessment Delegate Support) at the same time in the assessor portal.

The following tables outline the key functions for roles within the assessor portal, as well as the roles that others, such as the contact centre, play in the client's aged care journey.

They include both client focused, and organisation focused tasks.

Client Focused Roles and Functions

Key Functions	Contact Centre	Administrator	Team Leader	Triage Delegate	Needs Assessor	RAC Funding Assessor	Assessment Delegate (clinical and non-clinical)	Assessment Delegate Support
View reports and documents		✓	✓	✓	✓	✓		
Manage staff accounts		✓						
Activate Aged Care Assessor app					✓	✓		
Provision of aged care information	✓	✓	✓	✓	✓	✓	✓	✓
Register a client or support person	✓				✓ excluding Residential funding assessors)			
Self-Refer a client					✓ (limited)			
Search for and view a client record			✓	✓	✓		✓	✓
Screening	✓				✓*			
Complete triage				✓	✓**			
Referral for assessment	✓				✓			
Conduct assessment					✓			
Enter assessment information on the client record (including completing the support plan)					✓		✓	
Service matching and referrals	✓				✓			
Management of assigned of Residential referrals			✓ Residential Funding Assessor Team Leads only)					
Action referral & deliver services								
Accept and reject assessment referrals			✓					
View tasks and notifications		✓	✓	✓	✓	✓	✓	✓
Manage task and notification preferences		✓						

Client Focused Roles and Functions *continued...*

Key Functions	Contact Centre	Administrator	Team Leader	Triage Delegate	Needs Assessor	RAC Funding Assessor	Assessment Delegate (clinical and non-clinical)	Assessment Delegate Support
View and Reassign SaH notifications			✓					
Record completed tasks in the portal			✓		✓			
Approve Delegate decisions							✓	
Print client information for the Delegate							✓	✓
Assign & transfer support plan reviews			✓		✓			
Conduct Support Plan Reviews					✓			

*A needs assessor who self refers will complete the screening component.

**A needs assessor can complete Triage if supervised by a Triage Delegate.

*** A Delegate can edit decisions within 43 days.

Organisation Focussed Roles and Functions

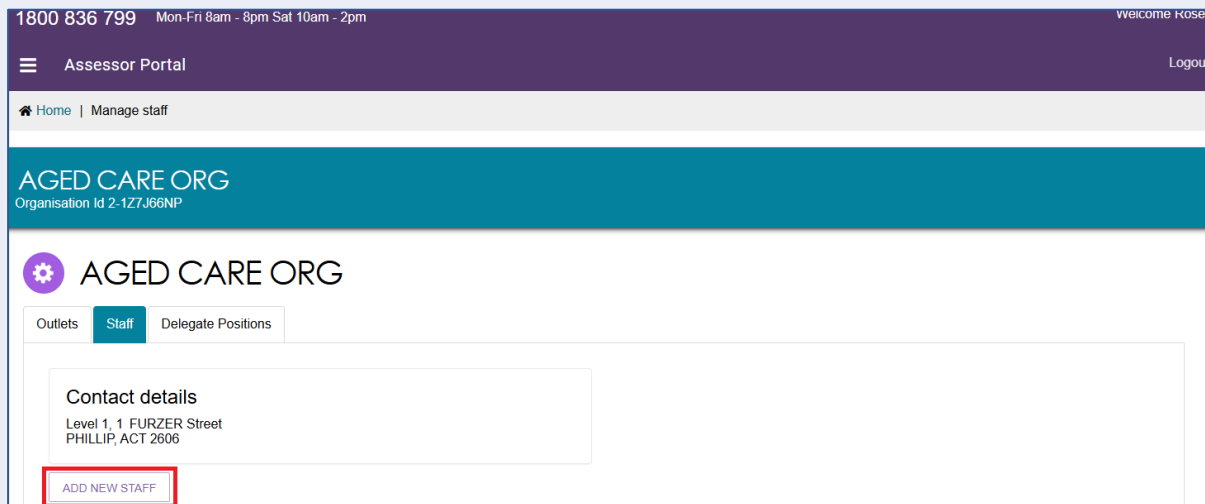
Key Functions	Administrator Role	Team Leader Role	Needs assessor Role	Triage Delegate	Assessment Delegate Role (clinical and non-clinical)	Assessment Delegate Support Role	RAC funding assessor
View My Aged Care interactions	✓	✓	✓	✓	✓	✓	✓
Request a change to contractual information	✓						
Manage staff accounts: add, edit, deactivate and remove	✓						

4.1 Creating New Staff Accounts and Assigning Roles

The first time each staff member logs into the assessor portal, they will need to follow the steps outlined in [Logging in to the Aged Care Systems](#) on the department's website.

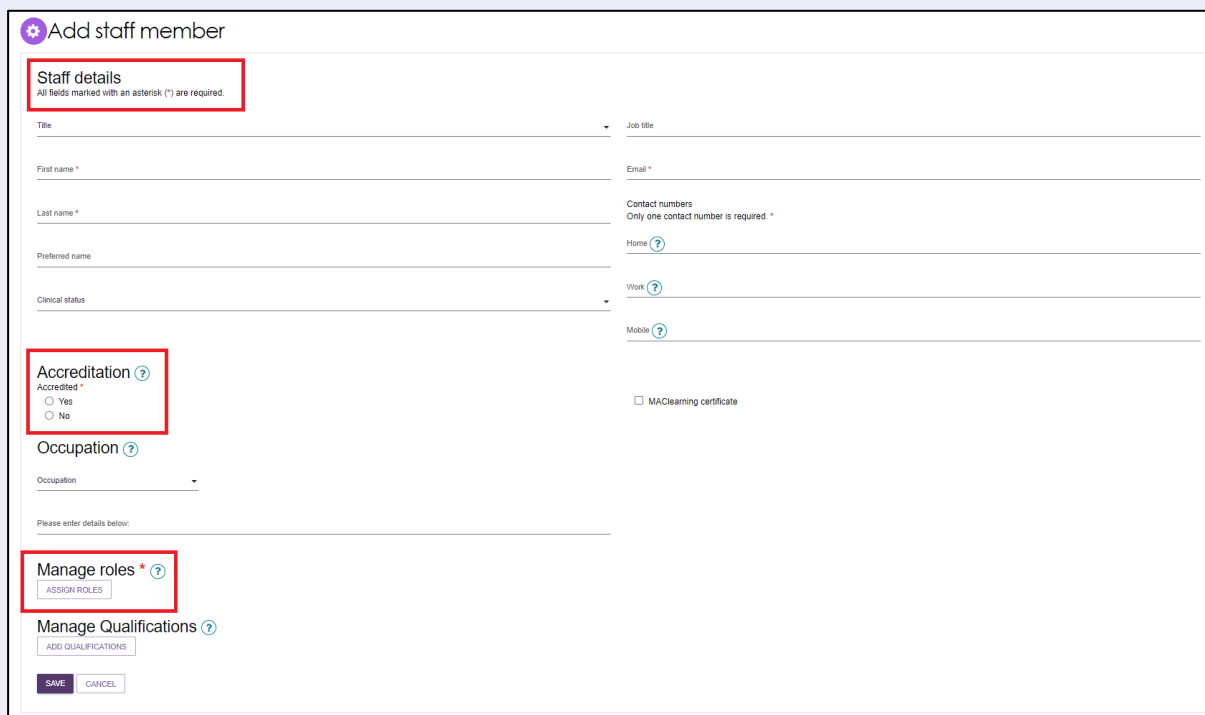
Follow these steps to create a new staff account:

1. From the **Staff** tab in the Organisation administration page, select **ADD NEW STAFF**.



The screenshot shows the top navigation bar with the phone number 1800 836 799, operating hours (Mon-Fri 8am - 9pm, Sat 10am - 2pm), and a 'Welcome Rose' message. Below this is the 'Assessor Portal' header with a 'Logout' link. The main content area shows the 'Manage staff' page with the 'AGED CARE ORG' logo and 'Organisation Id 2-127J66NP'. The 'Staff' tab is selected, and the 'ADD NEW STAFF' button is highlighted with a red box.

2. Enter staff details (First name, last name, unique email address and a contact number).
Select whether they are accredited, then assign role(s) to staff under the Manage Roles section. Refer to the next step for managing roles.



The screenshot shows the 'Add staff member' form. The 'Staff details' section is highlighted with a red box and includes fields for Title, Job title, First name, Email, Last name, Preferred name, Clinical status, Home, Work, and Mobile. The 'Accreditation' section is also highlighted with a red box and includes an 'Accredited' radio button (Yes/No) and a 'MAClearing certificate' checkbox. The 'Manage roles' section is highlighted with a red box and includes an 'ASSIGN ROLES' button. The 'Manage Qualifications' section includes an 'ADD QUALIFICATIONS' button. At the bottom, there are 'SAVE' and 'CANCEL' buttons.

3. To Manage Roles, select the role you wish to assign to that staff member and select **SAVE**.

Manage roles X

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

Please select the role(s) *

<input checked="" type="checkbox"/> Administrator	<input type="checkbox"/> Team Leader
<input type="checkbox"/> Delegate Support	<input type="checkbox"/> Comprehensive Assessor
<input type="checkbox"/> Home Support Assessor	

Add, Cease or Replace Delegate Roles through [Delegate Positions](#)

Clinical Assessment Delegate ?

Triage Delegate ?

Non-Clinical Assessment Delegate ?

SAVE
CANCEL

! Delegate roles cannot be assigned by organisation administrators and instead require needs assessors, Team Leaders or Operational Managers to submit an application. For more information regarding the application for delegate roles please refer to [My Aged Care Assessor Portal User Guide 12 – Managing delegate roles](#).

- !**
- Either the **Residential Funding Assessor** or **Residential Funding Assessor (Restricted)** role can be selected for each staff. That is, they cannot be assigned both roles.
 - A Residential Funding Assessor or Residential Funding Assessor (Restricted) can also be a Residential Funding Team Lead.
 - As per the Statement of Requirements for the Single Assessment System workforce, if the assigned role is Residential Funding Assessor, Residential Funding Assessor (Restricted), clinical needs assessor (Comprehensive Assessor) or Team Leaders the Australian Health Practitioner Regulation Agency (AHPRA) ID and the Discipline of the assessor *needs* to be recorded at the Accreditation section of the Add Staff Member page.

Accreditation ?

Accredited *

Yes

No

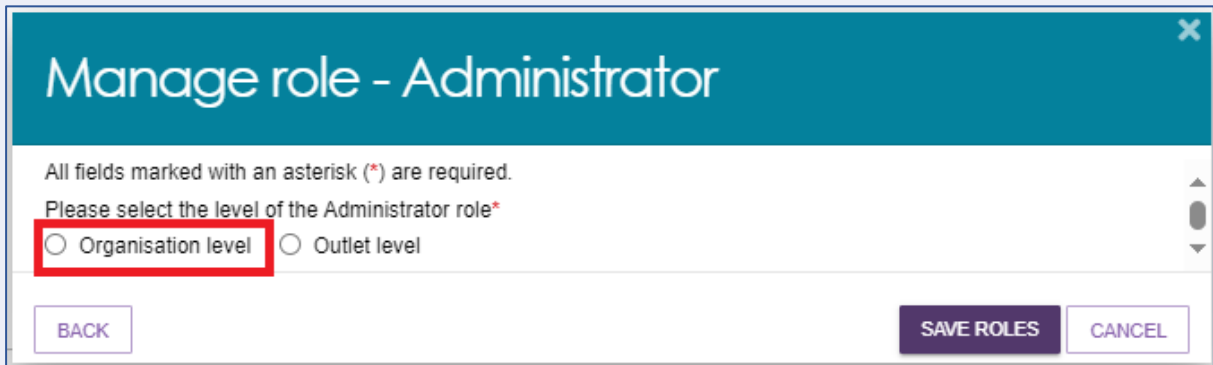
Learning management system ID

Expiry date

(e.g. dd/mm/yyyy)

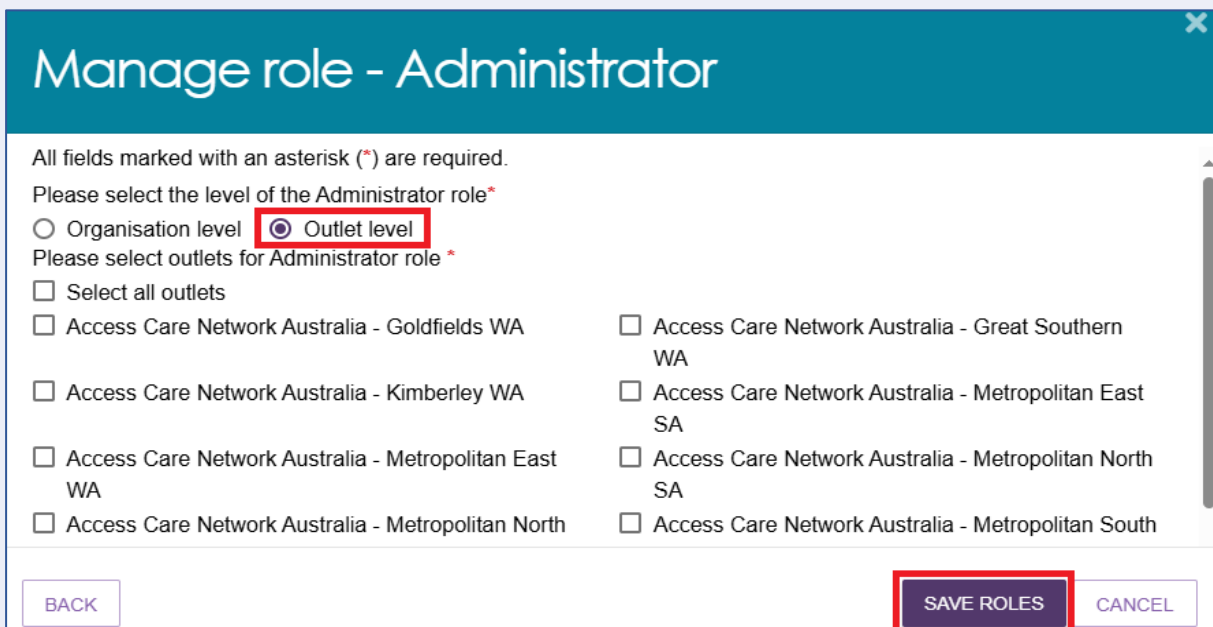
Staff member has completed the appropriate accreditation and other training requirements as part of their contractual obligations and as directed by the Department and relevant to their roles and responsibilities. Comprehensive Assessors must hold current unrestricted registration with the Australian Health Practitioners Regulation Agency (AHPRA) or other relevant professional association, for example social workers must be registered by the Australian Association of Social Workers.

To assign an Administrator role at the organisation level, select **Organisation Level** button, then **SAVE ROLES**. Any staff roles that are assigned at this level are automatically replicated across all outlets.



The screenshot shows a form titled "Manage role - Administrator". At the top, it says "All fields marked with an asterisk (*) are required." Below that, it asks "Please select the level of the Administrator role*". There are two radio button options: "Organisation level" (which is selected and highlighted with a red box) and "Outlet level". At the bottom of the form, there are three buttons: "BACK", "SAVE ROLES", and "CANCEL".

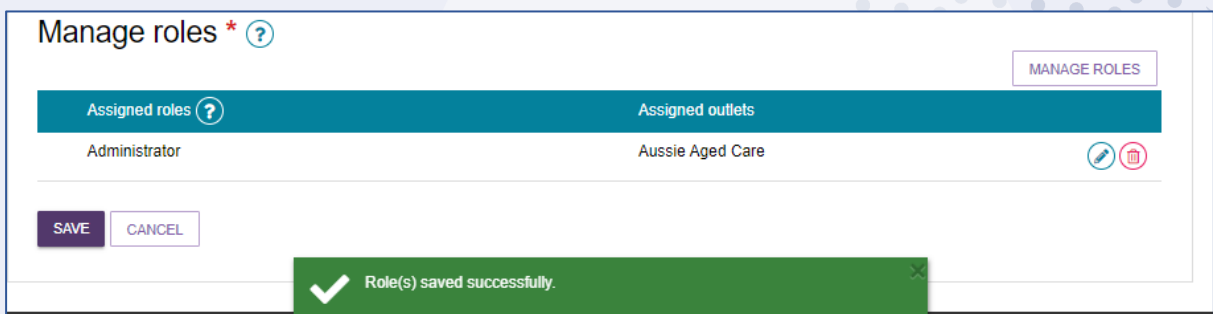
If you wish to limit an employee role to one or more outlets, select the **Outlet Level** option instead, then **SAVE ROLES**.



The screenshot shows the same "Manage role - Administrator" form, but now "Outlet level" is selected (highlighted with a red box). Below the radio buttons, it says "Please select outlets for Administrator role *". There are two columns of checkboxes, each with a label: "Select all outlets", "Access Care Network Australia - Goldfields WA", "Access Care Network Australia - Kimberley WA", "Access Care Network Australia - Metropolitan East WA", "Access Care Network Australia - Metropolitan North", "Access Care Network Australia - Great Southern WA", "Access Care Network Australia - Metropolitan East SA", "Access Care Network Australia - Metropolitan North SA", and "Access Care Network Australia - Metropolitan South". At the bottom, the "SAVE ROLES" button is highlighted with a red box.

4. A green banner appears when the role/s are saved successfully. It will display under the Manage Roles section, along with any assigned outlets.

Select **SAVE** to continue.



The screenshot shows the "Manage roles" section. At the top, it says "Manage roles * ?". Below that, there is a table with two columns: "Assigned roles" and "Assigned outlets". The table has one row: "Administrator" under "Assigned roles" and "Aussie Aged Care" under "Assigned outlets". There are icons for edit and delete next to "Aussie Aged Care". Below the table, there are "SAVE" and "CANCEL" buttons. At the bottom, there is a green banner with a checkmark and the text "Role(s) saved successfully."

- The new Administrator is now displayed under the Staff section of your organisation. The Staff Card contains the accreditation status and the role/s.

AGED CARE ORG LTD

Outlets **Staff** Delegate Positions

Contact details
Level 1, 16 FURZER Street
PHILLIP, ACT 2606

ADD NEW STAFF

Staff (18)

Filter by

Sort order: A-Z

Current sort order is A-Z

<p>America FERDINAND</p> <p>Staff member ID: BL_GB505560 Work: 02 7412 7412 Email: america.ferdinand@uattest.au Non-accredited Roles: Administrator</p> <p>Active</p>	<p>Andy FLOWER</p> <p>Staff member ID: BL_XF196942 Home: 02 7412 8523 Email: andyflower@uattest.au Accredited Clinical Status: Clinical Roles: Comprehensive Assessor</p> <p>Active</p>	<p>Simon FLOWER</p> <p>Staff member ID: BL_XF460739 Home: 02 6145 8596 Email: simonflower@testuat.au Non-accredited Clinical Status: Non-Clinical Roles: Team Leader, Triage Delegate</p> <p>Active</p>
--	---	---

4.2 Deactivate a Staff Account

Follow these steps to deactivate a staff account:

- From the **Staff** tab on the **Organisation administration** page, select the name of the staff member on the **Staff card** that you want to deactivate.

Golden NT
Organisation ID 1-Y558INK

Staff (3)

Filter by

View status: Active Outlet: Staff name:

View status is Active

Sort order: A-Z

Current sort order is A-Z

<p>Honey CHRISTIE</p> <p>Staff member ID: BL_AI108210 Email: UAT22@health.gov.au Non-accredited Roles: Administrator</p> <p>Active</p>	<p>Mary CITIZEN</p> <p>Staff member ID: BL_WK340415 Mobile: 0413 048 616 Email: mary.citizen@gmail.com Accredited Roles: Administrator</p> <p>Active</p>	<p>Chris JORDAN</p> <p>Staff member ID: BL_QA909304 Email: jodanc@a.com Non-accredited Roles: Administrator</p> <p>Active</p>
--	---	---

- From the View staff member page, select DEACTIVATE.

View staff member

Ms Mary CITIZEN
 (Active)
 Staff member ID BL_WK340415

DEACTIVATE

Contact details
 Email: mary.citizen@gmail.com
 Contact numbers: 0413 048 616 (Mobile)

Accreditation
 Accredited: Yes
 Learning management system ID
 Expiry date: 31/12/2022

Golden Nursing- Darwin
 • Administrator

Golden Assessment Outlet
 • Administrator

EDIT STAFF DETAILS

- Select **DEACTIVATE ACCOUNT** to confirm. If the assessor you'd like to deactivate has any assigned assessments assigned, these will be shown to you in the confirmation pop up.

Deactivate staff member

You are about to deactivate Mary CITIZEN. This will permanently lock the account and revoke all access to Aged Care Systems.
 Mary CITIZEN is currently assigned to 0 assessments.

DEACTIVATE ACCOUNT CANCEL

4.3 Removing and reactivating a Staff Account

Inactive staff (that have previously been deactivated) can be removed from organisations and outlets and will no longer display in the assessor portal.

- From the **Staff** tab of the **Organisation administration** page, select **Inactive** from the **View Status** drop down menu to view inactive staff.

Staff (2)

Filter by

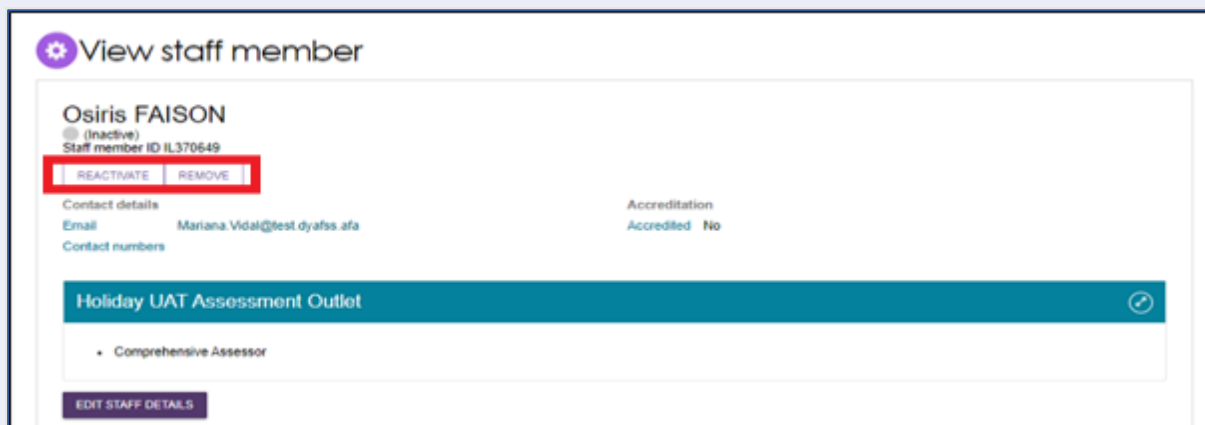
View status: **Inactive** (selected)
 Outlet: [dropdown]
 Staff name: [text input]

- Select the name of the staff member on the **Staff card** that you wish to remove.

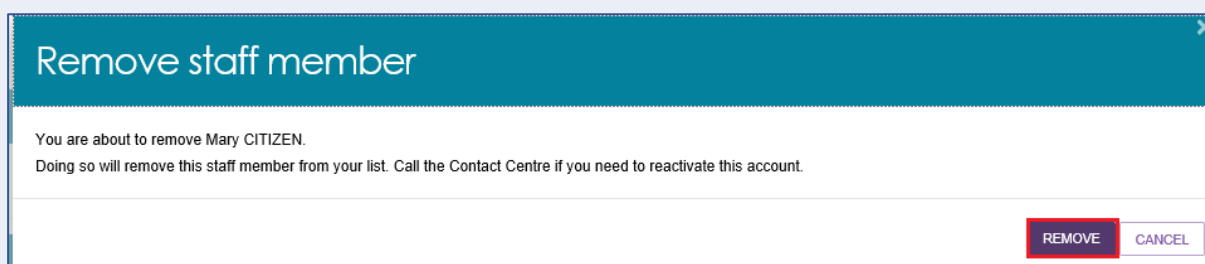
Mary CITIZEN
 Staff member ID: 1-YL4WZJD
 Mobile: 0413 048 616
 Email: mary.citizen@gmail.com
 Accredited
 Roles
 Inactive

Sam PALMER
 Staff member ID: 1-YL4XS8X
 Work: 02 9318 6149
 Email: s.palmer@golden.org.au
 Non-accredited
 Roles
 Inactive

- From the View staff member page, select REMOVE or REACTIVATE.



- Select **REMOVE** to remove the staff member from your staff list.



! If you need to restore access for a staff member who has been removed, call the My Aged Care Provider and Assessor Helpline at 1800 836 799.

You cannot re-create a portal user account using the same email address.

4.4 Edit a Staff Account

Follow these steps to edit a staff account:

1. From the **Staff** tab of the **Organisation administration** page, select the name of the staff member on the **Staff card** that you want to edit.

The screenshot shows the 'AGED CARE ORG LTD' staff management interface. At the top, there are tabs for 'Outlets', 'Staff', and 'Delegate Positions'. Below this is a 'Contact details' section with the address: 'Level 1, 16 FURZER Street, PHILLIP, ACT 2606'. An 'ADD NEW STAFF' button is present. The main section is titled 'Staff (18)' and features a 'Filter by' bar with dropdown menus for 'View status' (set to 'Active'), 'Outlet', and 'Staff name'. A 'View status is Active' filter is applied, with 'FILTER' and 'CLEAR' buttons. Below the filter is a 'Sort order' dropdown set to 'A-Z' and a 'GO' button. The current sort order is 'A-Z'. A list of staff cards is displayed, with 'America FERDINAND' highlighted by a red box. Other staff members shown include Andy FLOWER, Simon FLOWER, and Anya FORGER. Each card displays the staff member's name, ID, contact information, and accreditation status.

2. From the View staff member page, select EDIT STAFF DETAILS.

The screenshot shows the 'View staff member' page for Chris JORDAN. The page header includes the phone number '1800 836 799', the date and time 'Mon-Fri 8am - 8pm Sat 10am - 2pm', and the user's name 'Welcome Honey'. The page title is 'View staff member'. The staff member's name 'Chris JORDAN' is displayed with a status indicator '(Active)' and 'Staff member ID: BL_OA909304'. There is a 'DEACTIVATE' button. Contact details include 'Email: jordan@com' and 'Contact numbers'. Accreditation status is 'Accredited: No'. The staff member is associated with 'Golden NT' and has the role of 'Administrator'. A red 'EDIT STAFF DETAILS' button is visible at the bottom left.

3. Staff details and roles can be updated at any time.

To edit roles, select **Manage Roles** or the Edit (pencil) icon, and revise staff roles in the pop up/s that appear, then select **Save**.

⚙️ Add staff member

Staff details

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

Title	Job title
First name *	Email *
Last name *	Contact numbers Only one contact number is required. *

⚙️ Edit staff member

Staff details

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

Title	Job title
First name * Andy	Email * andyflower@uatlest.au
Last name * Flower	Contact numbers Only one contact number is required. * Home ? 0274128523
Preferred name	Work ?
Clinical status Clinical	Mobile ?

Accreditation ?

Accredited *

- Yes
 No

MAClearning certificate

Occupation ?

Occupation

Please enter details below.

Manage roles * ?

MANAGE ROLES

Assigned roles ?	Assigned outlets
Comprehensive Assessor	GRAZIER AGED CARE Outlet ACAT-RAS

Manage Qualifications ?

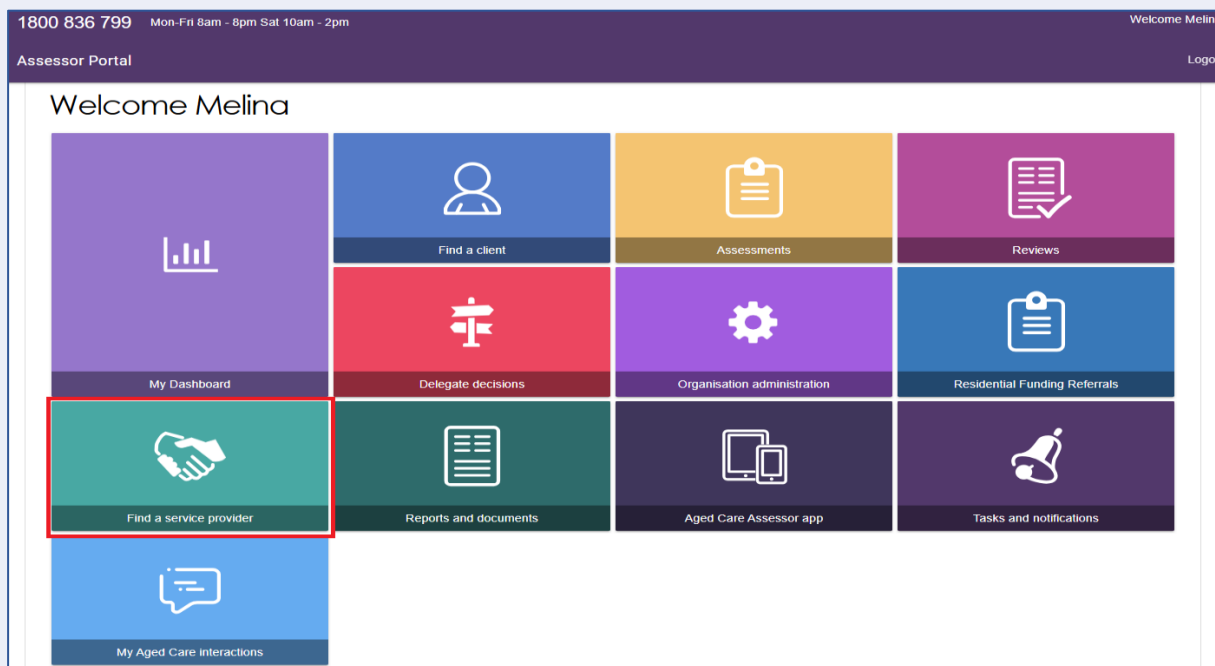
ADD QUALIFICATIONS

SAVE CANCEL



4.5 Find A Service Provider

Needs assessors, Team Leaders, Triage Delegates, Clinical Assessment Delegates, Non-clinical Assessment Delegates and Assessment Delegate Support roles have access to the **Find a Service Provider** function in the assessor portal.



Users can search for providers by entering the category, service type, location and diverse needs.

The screenshot displays the 'Find a service provider' search form. It includes a header with a home icon and the text 'Find a Service Provider'. Below the header, there is a section titled 'Locate these services:' with two dropdown menus: 'Select a category *' and 'Select a service type *'. A section titled 'Using this location or service provider name:*' contains two radio button options: 'Enter a suburb/postcode' and 'Enter a service provider name'. A 'Preferred language chosen:' section has a 'Preferred client language' input field with a plus icon. A 'SEARCH' button is located at the bottom left of the form area.

The results will then display below your search. Under each service provider's service card, there is information such as the provider's suburb, phone number, whether they are services available and whether there are waitlists available.


A link to the [My Aged Care](#) website is also listed which is where additional information such as the provider's compliance information can be found.

Using this location or service provider name:*

Enter a suburb/postcode
 Enter a service provider name


Enter suburb or postcode and select from the list below: *


PERTH, WA, 6000

Advanced search 


SEARCH


100 providers matched criteria

Homely Caring Services Perth 


 SUBIACO
01 9876 5432


Services supported:
All services searched supported

Special Home Care WA 

 SHENTON PARK
01 2345 6789

Services supported:
All services searched supported

Aussie Healthcare Perth 

 MELBOURNE
03 5567 6654

Services supported:
All services searched supported

























Expand the service card to view more information about the service provider.

The information details for the provider will then appear in a new page. You can also hover over any **help (question mark) icon** to reveal more information on a particular topic.

Information for Homely Caring Services Perth ✖ CLOSE

Homely Caring Services Perth

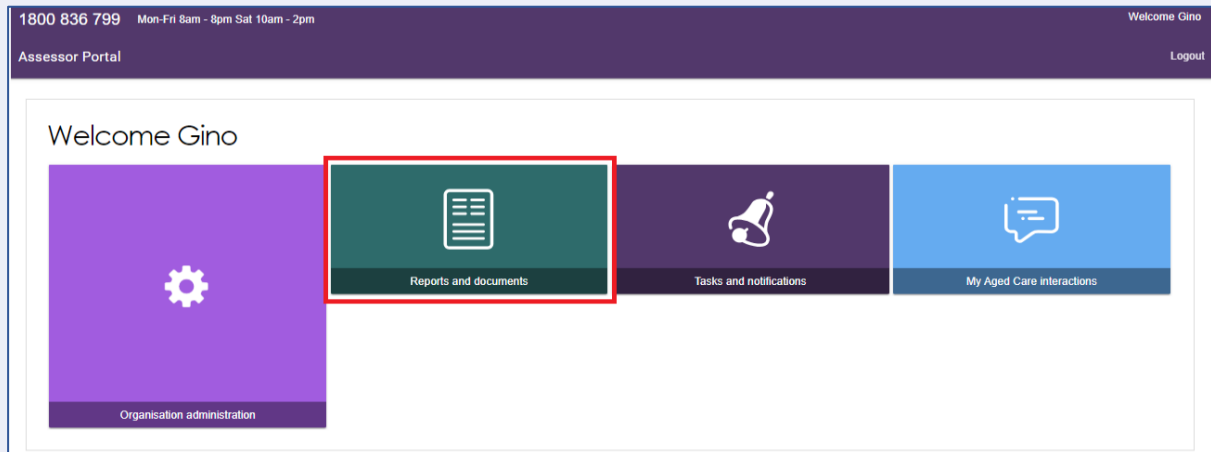
✓ Commonwealth Government recognised organisation
 Regulatory decisions are available here [↗](#)

<div style="background-color: #008080; color: white; padding: 5px; margin-bottom: 5px;">Service groups and types</div> <p>Assistive technology</p> <table border="0" style="width: 100%;"> <tr> <td style="width: 30%;">Equipment and products</td> <td style="width: 30%;">Service type availability ● Yes</td> <td style="width: 40%;">Classification type • Ongoing • Short-term</td> </tr> <tr> <td> See services</td> <td></td> <td></td> </tr> </table> <p>Home modifications</p> <table border="0" style="width: 100%;"> <tr> <td style="width: 30%;">Home adjustments</td> <td style="width: 30%;">Service type availability ● Yes</td> <td style="width: 40%;">Classification type • Short-term</td> </tr> <tr> <td> See services</td> <td></td> <td></td> </tr> </table> <p>Home support</p> <table border="0" style="width: 100%;"> <tr> <td style="width: 30%;">Home maintenance and repairs</td> <td style="width: 30%;">Service type availability ● Yes</td> <td style="width: 40%;">Classification type • Ongoing • Short-term</td> </tr> <tr> <td> See services</td> <td></td> <td></td> </tr> </table> <table border="0" style="width: 100%;"> <tr> <td style="width: 30%;">Home or community general respite</td> <td style="width: 30%;">Service type availability ● Yes</td> <td style="width: 40%;">Classification type • Ongoing • Short-term</td> </tr> <tr> <td> See services</td> <td></td> <td></td> </tr> </table> <table border="0" style="width: 100%;"> <tr> <td style="width: 30%;">Meals</td> <td style="width: 30%;">Service type availability ● Yes</td> <td style="width: 40%;">Classification type • Ongoing • Short-term</td> </tr> <tr> <td> See services</td> <td></td> <td></td> </tr> </table>	Equipment and products	Service type availability ● Yes	Classification type • Ongoing • Short-term	 See services			Home adjustments	Service type availability ● Yes	Classification type • Short-term	 See services			Home maintenance and repairs	Service type availability ● Yes	Classification type • Ongoing • Short-term	 See services			Home or community general respite	Service type availability ● Yes	Classification type • Ongoing • Short-term	 See services			Meals	Service type availability ● Yes	Classification type • Ongoing • Short-term	 See services			<div style="background-color: #008080; color: white; padding: 5px; margin-bottom: 5px;">Contact information</div> <p>87 CARING STREET SUBIACO WA, 6008</p> <p> Phone: 01 9876 5432  Fax: 01 2345 6789  Email: Quiana.Griggs@test.nbbss.bbo  Website: http://www.hcsp.com.au</p> <div style="background-color: #008080; color: white; padding: 5px; margin-bottom: 5px;">Support at home pricing</div> <p>Full Price List  Website  http://www.hcsp.com.au Pricing schedule  No attachment available</p> <div style="background-color: #008080; color: white; padding: 5px; margin-bottom: 5px;">Specialisations</div> <p>Diverse needs </p> <p>Specialised services </p> <ul style="list-style-type: none"> • Dementia • Continence • Respite care • Wellness and reablement • Assistive Technology
Equipment and products	Service type availability ● Yes	Classification type • Ongoing • Short-term																													
 See services																															
Home adjustments	Service type availability ● Yes	Classification type • Short-term																													
 See services																															
Home maintenance and repairs	Service type availability ● Yes	Classification type • Ongoing • Short-term																													
 See services																															
Home or community general respite	Service type availability ● Yes	Classification type • Ongoing • Short-term																													
 See services																															
Meals	Service type availability ● Yes	Classification type • Ongoing • Short-term																													
 See services																															

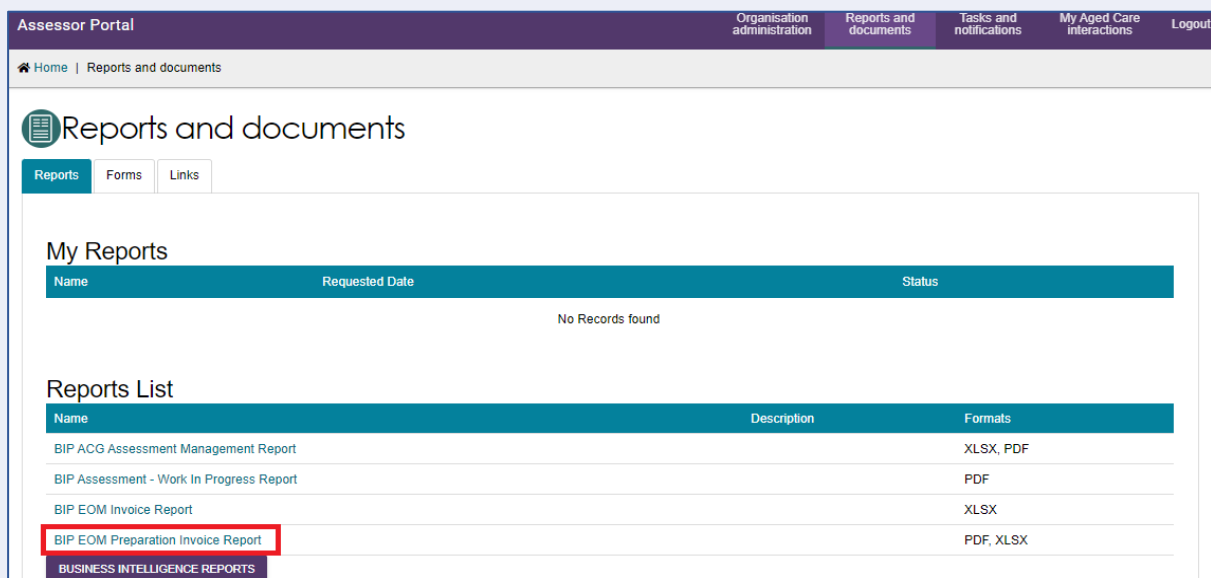
4.6 End of Month (EOM) Reporting

Organisation Administrators and Team Leaders for assessment organisations have the option to send the department a copy of their BIP EOM Preparation Invoice Report at the end of each month as a supporting document to their EOM Assessment invoice. To do this:

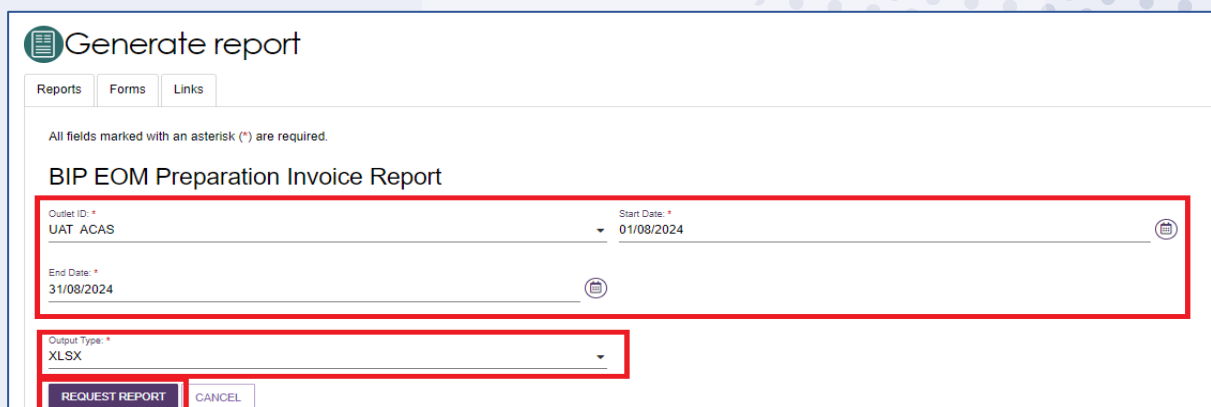
1. Select the **Reports and document** tile from the assessor portal homepage.



2. Select the BIP EOM Preparation Invoice Report



3. The Generate report page will display. Select the correct Outlet ID and enter the start and end date for the month you are reporting on. Next, select **XLSX** from the drop-down menu under Output Type. Then select **REQUEST REPORT**.



You will then be re-directed back to the **Reports and documents** page where the BIP EOM Preparation Invoice Report will display under **My Reports**. Select **View** to open the report.

The status of the report will display as *Processing* initially but will change to *Ready – View* once the report has been generated.

The screenshot shows the 'Reports and documents' page. Under the 'My Reports' section, there is a table with the following data:

Name	Requested Date	Status
BIP EOM Preparation Invoice Report	13 September 2024	Ready - View

Below this, there is a 'Reports List' section with a table of available reports:

Name	Description	Formats
BIP ACG Assessment Management Report		XLSX, PDF
BIP Assessment - Work In Progress Report		PDF
BIP EOM Invoice Report		XLSX

4. The report will then download to your computer as an Excel file. Select the **Open file** link from the Downloads pop up box, on the top right of your web browser page.

The screenshot shows a web browser window with a download notification. The notification box is titled 'Downloads' and contains the following information:

- File name: BIP EOM Preparation Invoice Report.XLSX
- Action: [Open file](#)
- Link: [See more](#)

The 'Open file' link is highlighted with a red box. The background shows the 'Assessor Portal' and the 'Reports and documents' page with the 'My Reports' table.

5. The report will then display in Excel.

The report will show the total number of assessments, along with information relating to each individual assessments including:

- the unique assessment ID (Event ID column)
- who completed the assessment
- the unique client ID (to help preserve a level of privacy)
- date the assessment was completed
- the assessment type at the triage stage
- if the assessment was complete in-hospital.

AutoSave Off BIP EOM Preparation Invoice Report (1).XLSX • Saved to this PC

File Home Insert Draw Page Layout Formulas Data Review View Automate Help Acrobat

Clipboard Font Alignment Number Styles

Calibri 11 A⁺ A⁻ B I U Merge & Center Wrap Text General Conditional Formatting Format as Table Normal Good

Z2

1	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
2			EOM Preparation Invoice Report															
3	<hr/>																	
7	Assessment Service																	
8	Completed home support and comprehensive assessments from 01/08/2024 to 31/08/2024																	
9	UAT Heidelberg ACAS - Banyule (C) - Heidelberg																	
10	The following home support and comprehensive assessments were recorded as having been completed between 01/08/2024 to 31/08/2024																	
11	Total Number of Assessments: 0 Home Support, 1 Comprehensive																	
12	Event ID	Assessor	Client ID	Date assessment	Triage Assessment	Service Item	NAPS Service	In-Hospital										
13	2-1ZHUT7S7	UAT.Ford UAT.Lovell	AC56749609	#####	Comprehensive Assessment	Heidelberg ACAS	23125	N										
14																		
15																		
16	End of report																	
17																		
18																		
19	Date Generated: 13-09-2024 11:12:53															Page 1 of 1		
20																		
21																		

For more information regarding reporting, refer to the [My Aged Care Assessment Manual](#).