



Assessor Portal User Guide 1 - Registering and referring clients for assessment

This user guide is to assist aged care needs assessors (assessors) in using the My Aged Care assessor portal (assessor portal) or the Aged Care Assessor App (the App) to register clients and refer them for assessment.

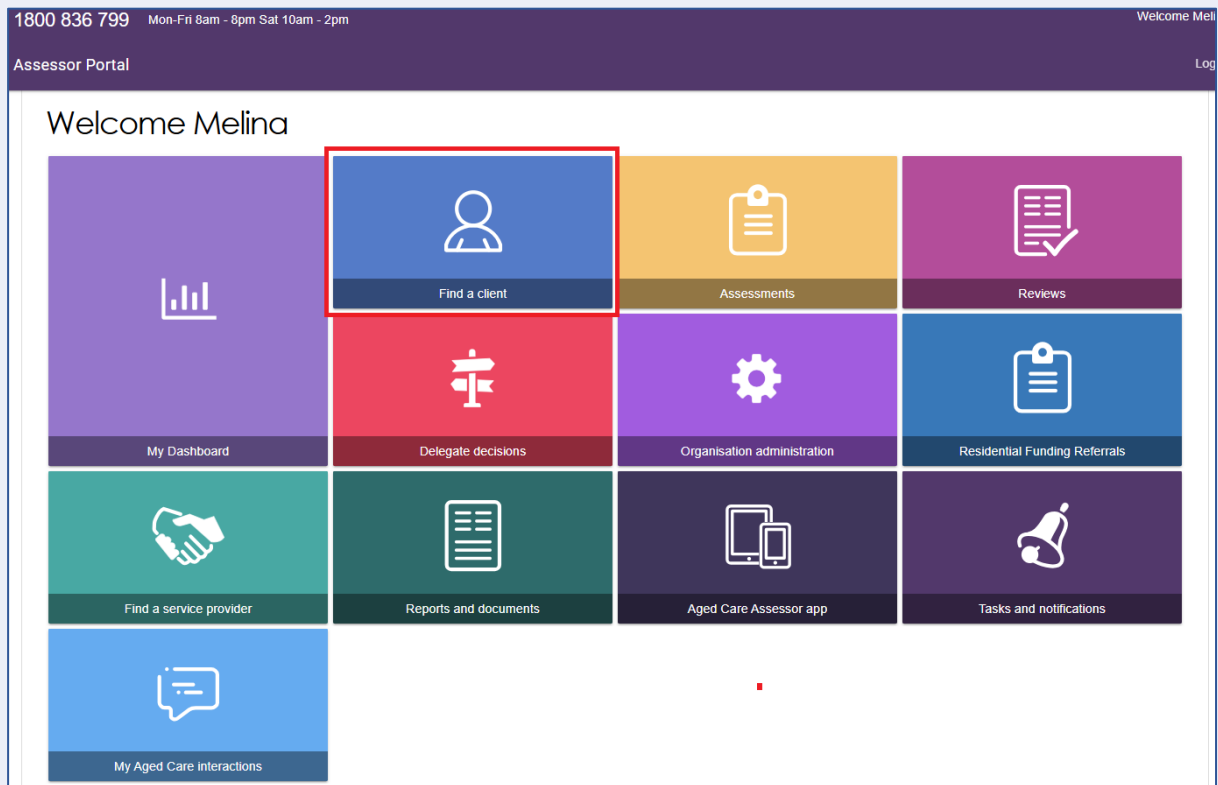
Table of contents

Finding a client in the Portal	2
Normal Search	2
Advanced Search.....	3
Client summary.....	5
Registering a client in the Portal.....	6
Email and SMS notifications	7
Registering or assessing a client in the App	8
Verifying a client’s identity	8
Self-referring a client and starting triage	9
Facilitating a referral for a potential client.....	13

Finding a client in the Portal

Before you register a person, you need to confirm that they do not already have a client record. Follow the steps below to determine if the client has an existing record.

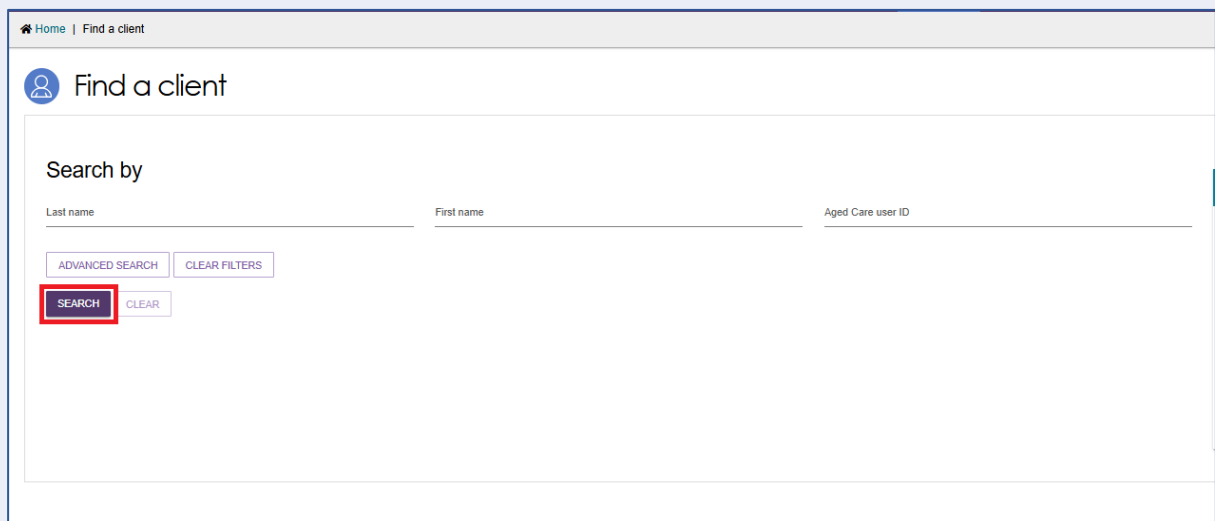
1. Select **Find a client** from the home page.



2. Next, search for the client. There are two ways to search: Normal or Advanced.

Normal Search

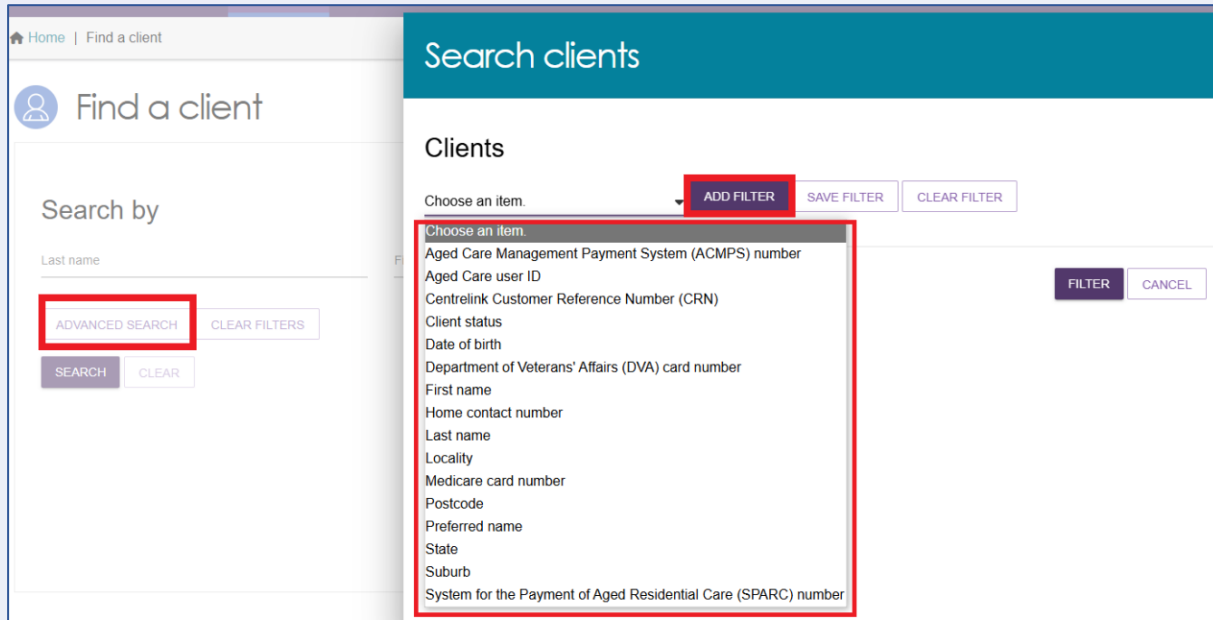
Enter the client's first name, last name and/or Aged Care User ID and select **SEARCH**.



Advanced Search

Alternatively, you can select **ADVANCED SEARCH** to conduct a custom or refined search.

The Advanced Search functionality allows you to search by additional fields, such as date of birth, Medicare number, suburb, etc. This filter can be applied across various sections within the portal. Choose the required filter item from the dropdown menu and select **ADD FILTER**.



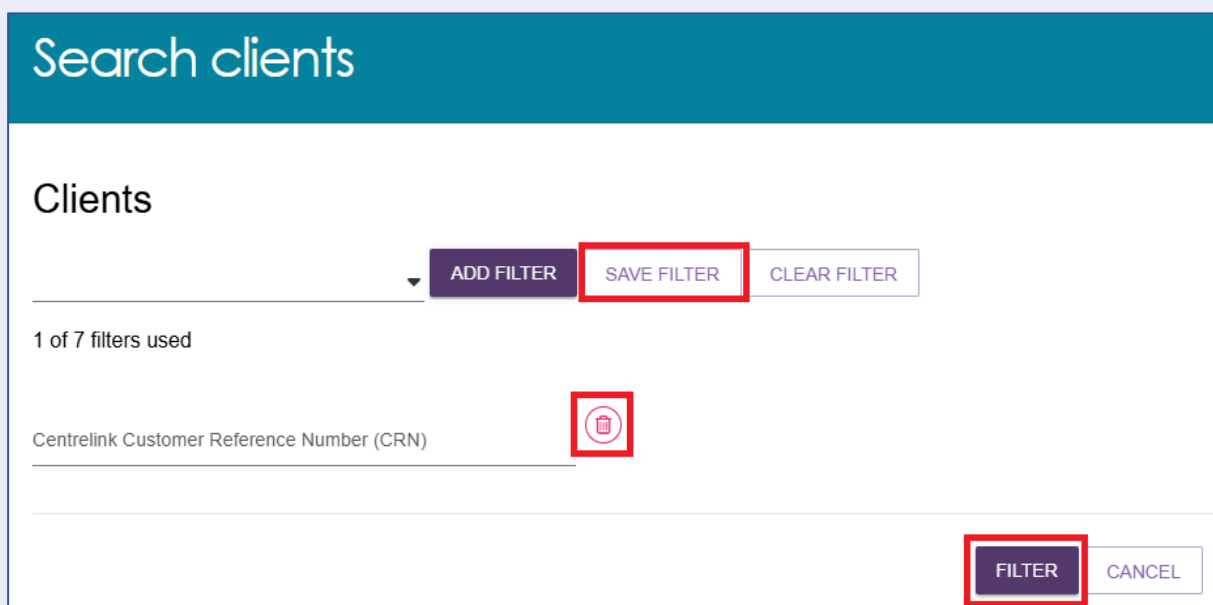
The screenshot shows the 'Search clients' page. On the left, under 'Find a client', the 'Search by' dropdown is set to 'Advanced Search'. Below it is a 'Last name' input field and 'SEARCH' and 'CLEAR' buttons. On the right, the 'Clients' section has a dropdown menu open, listing various search criteria. The 'ADD FILTER' button is highlighted in red. Below the dropdown, there are 'SAVE FILTER' and 'CLEAR FILTER' buttons. At the bottom right, there are 'FILTER' and 'CANCEL' buttons.

You can save a filter for future use by choosing the item and selecting **SAVE FILTER**.

This will display the custom filter (shown below) so it can be easily accessed in the future.

To remove a filter, select the red **Recycle Bin** button next to the filter you wish to remove. You can choose to add that filter back again.

To apply your chosen settings, select the **FILTER** button.



The screenshot shows the 'Search clients' page with a custom filter applied. The filter is 'Centrelink Customer Reference Number (CRN)'. The 'SAVE FILTER' button is highlighted in red. Below the filter name is a red 'Recycle Bin' icon. At the bottom right, there are 'FILTER' and 'CANCEL' buttons. The text '1 of 7 filters used' is displayed above the filter name.

When filters have been applied, the **Advanced Search** link changes to **MODIFY FILTER OPTIONS**.

Search by

Last name _____ First name _____

MODIFY FILTER OPTIONS CLEAR FILTERS

SEARCH CLEAR

Selecting **CLEAR FILTERS** will clear the information entered.

Selecting **CLEAR** will clear any current search results.

Any matching search results will be displayed.

The results will be shown either in Card view or List view, depending on your selection.

Example of card view

Search by

Last name: Smith First name: _____ Aged Care user ID: _____

ADVANCED SEARCH CLEAR FILTERS

Last name is Smith

SEARCH CLEAR

Sort Search Client by: Last name In order of: Alphabetical (A-Z) GO

Current sort order is Last name

1 to 10 out of 5236 matching results

Name	Address	Aged care user ID	Status
Mike SMITH	1/1 Sesame Street SYDNEY NSW 2000	AC85663847	Deceased
Mary SMITH	12/1 Sesame Street SYDNEY NSW 2000	AC12424131	Active
Karl SMITH	4 Privet Drive SURREY TAS 7999	61 2987 1234 AC93852184	Deceased
Mel SMITH	No address details found	AC47108998	Active

Example of list view

Find a client

Search by

Last name: Smith First name: _____ Aged Care user ID: _____

ADVANCED SEARCH CLEAR FILTERS

Last name is Smith

SEARCH CLEAR

1 to 50 out of 5236 matching results

Last name	First name	Aged care user ID	Address	Locality	Status	Home contact number
SMITH	Mike	AC85663847	1/1 Sesame Street	SYDNEY, NSW, 2000	Deceased	
SMITH	Mary	AC12424131	12/1 Sesame Street	SYDNEY, NSW, 2000	Active	
SMITH	Karl	AC93852184	4 Privet Drive	SURREY, TAS, 7999	Deceased	61 2987 1234
SMITH	Mel	AC47108998	No address details found	No address details found	Active	

Where there are multiple search results, please ensure you review the records first to determine the appropriate client.



Client summary

1. After selecting the appropriate client, the **Client summary** tab will display. This tab aims to provide a snapshot view of where a client is in their aged care journey. It contains key information of the client, such as Assessment information, Recommendations and approvals, Service delivery status, any concerns and goals and their statuses.

Information will only be displayed where it is applicable to the client.

The screenshot shows the 'Client summary' page for Captain Roland MOSES. The page header includes the client's name, age (85 years old), date of birth (14 June 1939), ACORN number (AC08403982), address (35 ISLAND ESPLANADE WHEREISIT, WA, 5897), and primary contact information (Roland Moses (self) - 08 3091 1305). The page is divided into several sections: 'Assessments' (Comprehensive Assessment), 'Recommendations and approvals' (Meals - Meal delivery, Meal preparation; Residential Respite Care), 'Service delivery status' (No referrals issued), 'Concerns' (Difficulty in walking for longer period of time; Unable to perform household tasks), and 'Goals' (To be able to walk long with minimal help; To be able to perform household task with minimum support). A 'Support at Home' section is also visible with a 'SEE SERVICE DETAILS' button.

2. If there are **No records returned** (as shown below), you can select **Register new client** for immediate assessment only.

! You must have the client's consent to successfully complete registration.

The screenshot shows the 'Find a client' search page. The search criteria are: Last name: Client, First name: Clara, Aged Care user ID: (empty). The search results show 'No records returned for IMMEDIATE ASSESSMENT only' and a red-bordered button labeled 'Register new client'.



Registering a client in the Portal

3. After the search for a client returns no records (see above), the **Register a client** link will be displayed. Enter client details and select **REGISTER**.

Home | Client

Register a client

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

Personal details

Title: Jane | First name: Jane | Last name: Smith

Gender: *

Please enter the date of birth. If the date of birth is not known, please enter an estimated age in the Age field. This will then be used to automatically determine an approximate date of birth for the Client.

Date of birth: * | OR | Age: *

(e.g. dd/mm/yyyy)

Does the client identify as an Aboriginal or Torres Strait Islander? | Does the client prefer a First Nations Assessment Organisation for their assessment?

Consent to send SMS and emails about the client

Please enter email address and mobile phone number if available.

Email address: | Country code: Australia +61 | Mobile phone number: | Contact phone number: (e.g. 02 1234 5678)

Identity match *

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

This person has a Medicare card.

Medicare card number

4 digits * | 5 digits * | 1 digit * | Reference *

This person does not have a Medicare Card Number.

Government ID *

A government ID number will assist us with retrieving existing care approvals from Services Australia (if there are any).

This person has a government ID (tick all that apply).

- Aged Care Management Payment System (ACMPS) number
- System for the Payment of Aged Residential Care (SPARC) number
- Department of Veterans' Affairs (DVA) card number
- Centrelink Customer Reference Number (CRN)

This person does not have a government ID.

Consent

Has the client consented to register? *

REGISTER CANCEL

4. The details include Name, contact details, if the client identifies as Aboriginal or Torres Strait Islander, if the client prefers an Aboriginal and Torres Strait Islander Assessment Organisation (if available), Medicare number and status, government ID and status, and consent status.

Home | Client

Register a client

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

Personal details

Title: Powers | First name: Powers | Last name: Powers

Gender: *

Please enter the date of birth. If the date of birth is not known, please enter an estimated age in the Age field. This will then be used to automatically determine an approximate date of birth for the Client.

Date of birth: * | OR | Age: *

(e.g. dd/mm/yyyy)

Does the client identify as an Aboriginal or Torres Strait Islander? | Does the client prefer a First Nations Assessment Organisation for their assessment?

Yes - Both

! Aboriginal and Torres Strait Islander assessment organisations will be standing up slowly over time to offer a choice for Aboriginal and Torres Strait Islander people from 1 November 2025. Over time, the service will extend its reach and work towards covering more areas across Australia.



! Remember to validate the address when you enter a new address or when you edit an existing address.

This will ensure that any correspondence will be sent to the correct address, and that the client will be allocated to the correct address category (MMM Classification) for assessment purposes.

Enter Suburb and postcode and select from the list below *

WEST WODONGA, VIC, 3690

SUBURB IS NOT LISTED, CLICK HERE

Country *

Australia

VALIDATE THIS ADDRESS

Did you mean

- 1 HANLON Court WEST WODONGA VIC 3690
- 2 HANLON Court WEST WODONGA VIC 3690
- 3 HANLON Court WEST WODONGA VIC 3690
- 4 HANLON Court WEST WODONGA VIC 3690
- Not found, use entered address anyway: Milpara Unit 36 7 HANLON Court WEST WODONGA VIC 3690

Email and SMS notifications

! Client email addresses and/or mobile phone numbers can be captured at registration.

You must have the client's consent to receive email and/or SMS notifications.

Clients and/or their supporters can nominate an email address and/or mobile phone number to receive notifications when they reach key stages of their My Aged Care journey.

To set up email and/or SMS notifications for a client at registration, select the **Consent to send SMS and emails about the client** checkbox and input an email address and/or mobile phone number.

Consent to send SMS and emails about the client

Please enter email address and mobile phone number if available.

Email address:

Country code: Australia +61

Mobile phone number: (e.g. 02 1234 5678)

Email and/or SMS notification preferences can be viewed or modified on the **Client details** tab in the assessor portal.

Refer to the [My Aged Care – Assessor Portal User Guide 2 – Registering support people and adding relationships](#) for information about enabling email notifications for existing clients and supporters.



Registering or assessing a client in the App

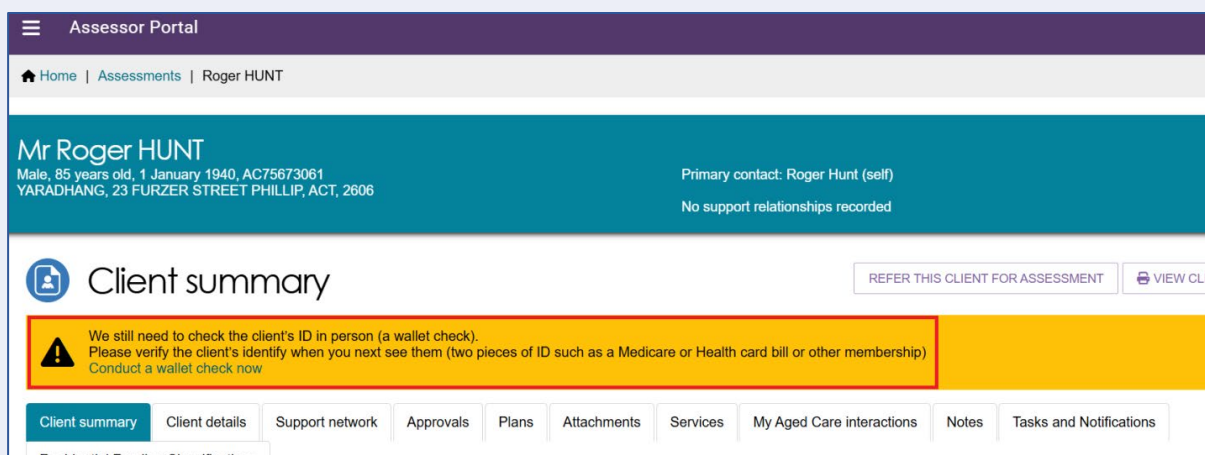
If you are using the App and you need to undertake an assessment for a client who has not been referred to your organisation, you can use the **Add offline client** function.

See the [Aged Care Assessor Application User Guide](#) for this process.

When you are reconnected to the Internet, you will need to register the client if they do not have an existing record and facilitate a referral for assessment via the contact centre before linking the offline client to the registered record.

Verifying a client's identity

1. From the Client Record in **Find a client**, you can verify the client's identity by selecting **Conduct a wallet check now**. The wallet check can also be conducted through the App or at other stages of the assessment.

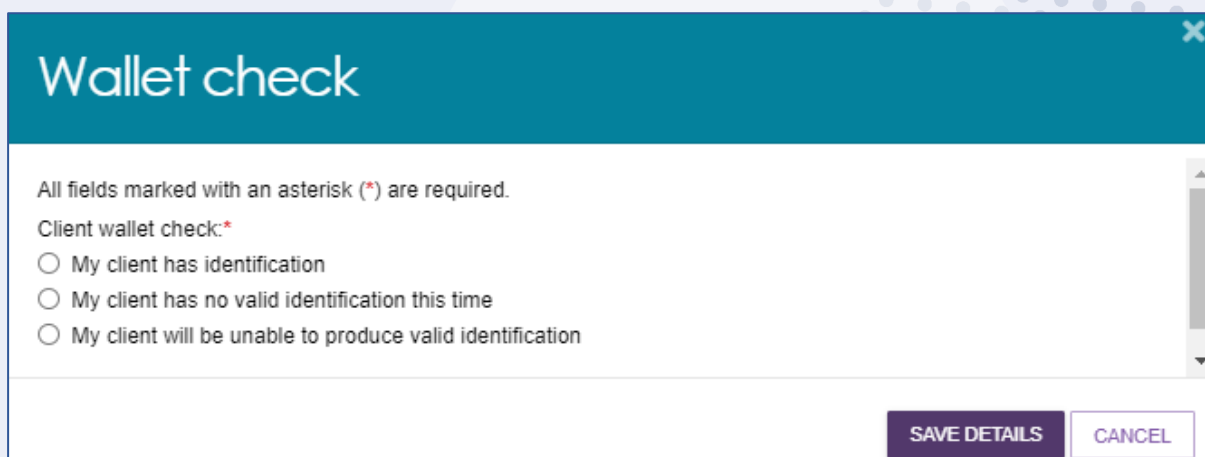


The screenshot shows the 'Assessor Portal' interface. At the top, there's a navigation bar with 'Assessor Portal' and a breadcrumb trail: 'Home | Assessments | Roger HUNT'. Below this, the client's name 'Mr Roger HUNT' is displayed, along with his details: 'Male, 85 years old, 1 January 1940, AC75673061, YARADHANG, 23 FURZER STREET PHILLIP, ACT, 2606'. To the right, it says 'Primary contact: Roger Hunt (self)' and 'No support relationships recorded'. The main section is titled 'Client summary' and includes a warning box: 'We still need to check the client's ID in person (a wallet check). Please verify the client's identify when you next see them (two pieces of ID such as a Medicare or Health card bill or other membership). Conduct a wallet check now'. Below the warning are several tabs: 'Client summary', 'Client details', 'Support network', 'Approvals', 'Plans', 'Attachments', 'Services', 'My Aged Care interactions', 'Notes', and 'Tasks and Notifications'. There are also buttons for 'REFER THIS CLIENT FOR ASSESSMENT' and 'VIEW CLIENT'.

2. A dialog box appears. Select the appropriate scenario and then select **SAVE DETAILS**.

If you select:

- **My client has identification**, you will then be prompted to enter two types of ID and the date that you have performed the check.
- **My client has no valid identification this time**, you will then be prompted to ask the client for ID in the future.
- **My client will be unable to produce valid identification**, you will not be prompted to ID-check this client in the future.



The screenshot shows a 'Wallet check' dialog box. It has a title bar with 'Wallet check' and a close button. Below the title bar, it says 'All fields marked with an asterisk (*) are required.' and 'Client wallet check:*'. There are three radio button options: 'My client has identification', 'My client has no valid identification this time', and 'My client will be unable to produce valid identification'. At the bottom right, there are two buttons: 'SAVE DETAILS' and 'CANCEL'.

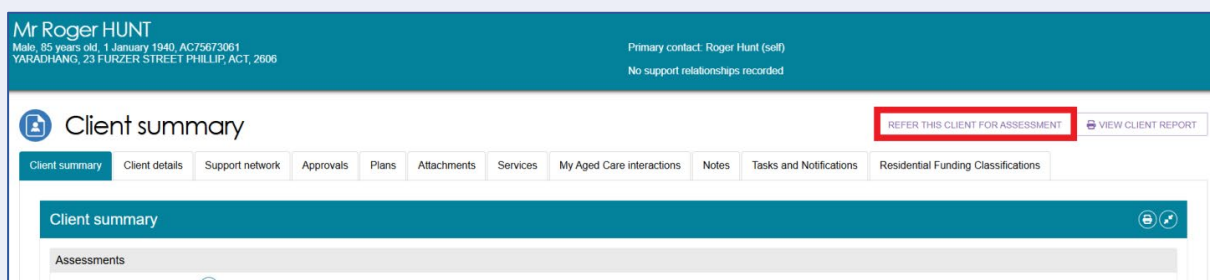
Self-referring a client and starting triage

- ! Triage must be completed by a clinical staff member who holds the Triage Delegate role in the My Aged Care assessor portal.

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

- ! Assessors can self-refer clients for assessment as long as the assessment type is supported by their outlet. For example, non-clinical aged care needs assessors (non-clinical assessors) can self-refer for both Home Support and Comprehensive assessments if their outlet supports both assessment types.

1. From the Client record in **Find a client**, you can self-refer the client for assessment by selecting **REFER THIS CLIENT FOR ASSESSMENT**.



2. In the pop-up box you will need to:
 - assign the client to Myself or to My Organisation (for guidance on when to refer to yourself or your organisation, refer to the [My Aged Care Assessment Manual](#))
 - select the assessment type (comprehensive or home support)
 - select the outlet for this referral
 - select the assessment setting (for comprehensive assessments only)
 - choose the assessment priority rating (High, Medium, Low)
 - the reason for self-referring (remote assessment, first nations, in-hospital, homeless or at risk of or vulnerable).
3. Then, select **CREATE REFERRAL**.

Refer client for assessment ✕

i If the client has a scheduled, submitted or assigned Support Plan Review, by referring the client for a new assessment, the scheduled, submitted or assigned Support Plan Review will be cancelled when the new assessment has been accepted by the Assessment Organisation.

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

An Aged Care Assessment referral will be created for Aadi Smith.

Assign this referral to*

Myself

My Organisation

Please select the assessment type *

Comprehensive Assessment ▼

Please select outlet for this referral *

Assessment setting: * ?

Hospital

Non-Hospital

Priority: * ?

Low ▼

Reason for self-referring * ▼

CREATE REFERRAL
CANCEL

Please note that the **ASSESSMENT SETTING** option will not be available for **HOME SUPPORT ASSESSMENT**.

Refer client for assessment

i If the client has a scheduled, submitted or assigned Support Plan Review, by referring the client for a new assessment, the scheduled, submitted or assigned Support Plan Review will be cancelled when the new assessment has been accepted by the Assessment Organisation.

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

An Aged Care Assessment referral will be created for Alek Hardison.

Assign this referral to*

Myself

My Organisation

Please select the assessment type *

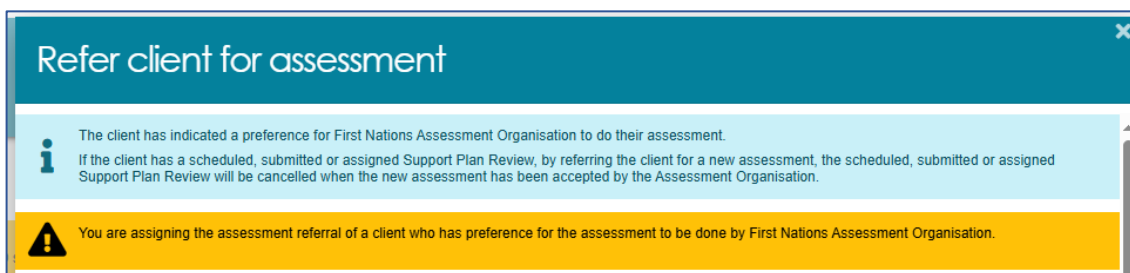
Home Support Assessment ▼

Please select outlet for this referral *

Priority: * ?



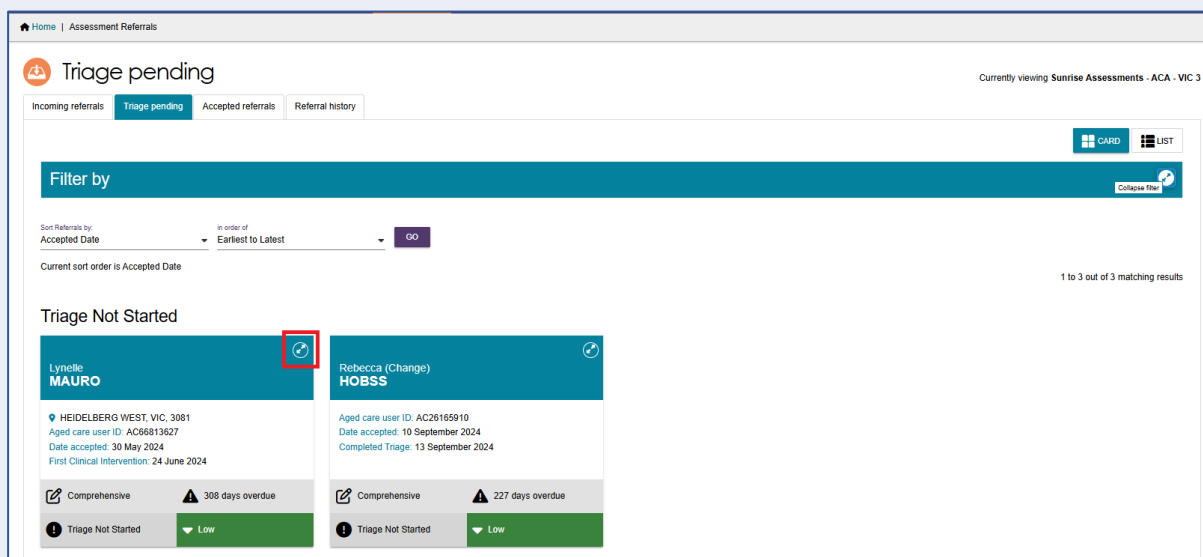
! If the client prefers their assessment to be completed by an Aboriginal and Torres Strait Islander Assessment Organisation, this will be displayed in both the information (blue) banner and the warning (amber) banner.



! Cohabitants

If you identify a potential client with aged care needs that is cohabitating with the current client at the time of the assessment, you may wish to encourage that person to contact My Aged Care to request screening which will determine eligibility for an assessment referral. For more information, please refer to [Facilitating a referral for a potential client](#).

4. If you have selected to assign the referral to yourself, you will then be re-directed to the **Current assessments** page. To complete the assessment, triage must first be completed. To begin triage, select the expand button at the top right of the client card.



5. Next, select **START TRIAGE** and complete the relevant consent and demographic fields. For information on how to complete a triage, refer to the [My Aged Care – Assessor Portal User Guide 3 – Managing referrals for assessment and support plan reviews](#).



Lynelle MAURO

Preferences

No preference was recorded

Assessment details

Assessment type Comprehensive
Assessment reason Reme 1D8CE671
Assessment setting Non-Hospital

Support plan review 27 May 2024
Support plan 6 August 2019
Home Support Assessment 3 August 2020
Home Support Assessment 21 May 2019

This assessment referral has been generated from a support plan review where it has been identified that the client requires a new assessment.

First Clinical Intervention due by 24 June 2024

Client story

28/06/2024
And I burrowed a hole in the glowing coal, and I stuffed in Sam McGee 0BDD757073 There is never a de

27/05/2024
He turns to me and Cap says he Ill cash in this trip I guess D8EF367647 Before I got married I had six theories about bringing

[VIEW ALL 10 CLIENT NOTES](#)

Comments

[VIEW FULL CLIENT RECORD](#)

[VIEW CLIENT REPORT](#)

[START TRIAGE](#)

[REASSIGN](#)

[REFER URGENT SERVICES](#)

[REJECT](#)

[TRANSFER](#)

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

6. If you have assigned the referral to **Yourself** and you are also a Triage Delegate, you can complete triage and then proceed to the assessment using the IAT. You can also mark a client's incoming referral as Ineligible for Assessment without conducting triage. For more information refer to [My Aged Care – Assessor Portal User Guide 3 – Managing referrals for assessment and support plan reviews](#).

If you have selected to assign the referral to **Yourself** and you are not a Triage Delegate, then you will only be able to complete triage with the supervision of a Triage Delegate. This must be captured in the portal at the time of triage.

To record the details of your supervision, at the bottom of the triage questions is a **Details of the supervised Triage** section. Select the relevant supervisor and then select **SAVE TRIAGE**. You will then be able to proceed with completing the assessment using the IAT.

Mrs Miriam DAVIS

Female, 89 years old, 31 October 1935, AC29009883
Prefers to speak Greek

Does the client require urgent service provision (direct to service)? *

Yes No

Outcome/advice for assessment notes

0 / 500

Details of the supervised Triage

Triage supervised by *



Facilitating a referral for a potential client

A client referral must be assigned to you in the assessor portal before you can complete an assessment for that client.

If a potential client has aged care needs is cohabitating with the current client at the time of the assessment, and has not been referred to you, follow the steps below.

1. Encourage the person to contact My Aged Care contact centre on 1800 200 422 to request screening which will determine eligibility for an assessment referral.
2. Once eligibility is determined, a team leader will need to accept the referral in the assessor portal.
3. A Triage Delegate will then need to complete triage.
4. Following this the Triage Delegate or a Team Leader can then assign it to an assessor.
5. If the referral is assigned to you, it will appear in your **Current assessments** list in the **Assessments** tile. From here, you will be able to begin the assessment.

The screenshot displays the 'Current assessments' interface. At the top, there are tabs for 'Current assessments' and 'Recent assessments'. A 'Filter by' bar is present, along with sorting options: 'Sort by: Assessment Priority' and 'In order of: High to Low'. A 'GO' button is next to the sorting options. Below the sorting options, it states 'Current sort order is Assessment Priority'. On the right side, there are 'CARD' and 'LIST' view toggles. The main content area shows '1 to 2 out of 2 matching results'. Two assessment cards are visible, both with the status 'Assessment Not Started'. The first card is for 'Mark JUNE' with a 'Medium' priority and a due date of '23 September 2024'. The second card is for 'Fred DENNI' with a 'Low' priority and a due date of '22 September 2024'. Both cards show 'Comprehensive' assessment type and 'Due in 3 days' or 'Due in 2 days'.