



Australian Government



myagedcare

## Assessor Portal User Guide 10 - Assessment Delegate Processes

This user guide is to assist Assessment Delegates in performing a range of functions in the My Aged Care assessor portal (assessor portal) that relate to the requirements set out in the *Aged Care Act 2024* as the role of System Governor.

This includes viewing and actioning delegate decisions, as well as requesting corrections to care approval decisions and care extensions.

Clinical assessment delegates can approve an older person for all service groups, classification types and classification levels under the *Aged Care Act 2024*.

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 AT-HM).

**!** To understand Clinical and Non clinical assessment delegate responsibilities under the *Aged Care Act 2024*, refer to 'Chapter 7: Delegations and Approvals under the Act' of [My Aged Care Assessment Manual](#).

From 29 June 2026, the offline workaround for Non-clinical Delegate decisions will be replaced by a full in-system workflow.

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## The Assessment Delegate home screen

Both the Clinical assessment delegate and the Non-clinical assessment delegate can view the same tiles in the Assessor Portal home page. The only difference is the extent of assessment types that each role can approve.

**Clinical assessment delegates** can approve an older person for all service groups, classification types and classification levels under the Aged Care Act 2024. They can assign and initiate corrections on Comprehensive and Home support assessments.

**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.

Both Clinical and Non-clinical assessment delegates can add recommendations of No Care Approval or No Change to Existing Care Approvals.

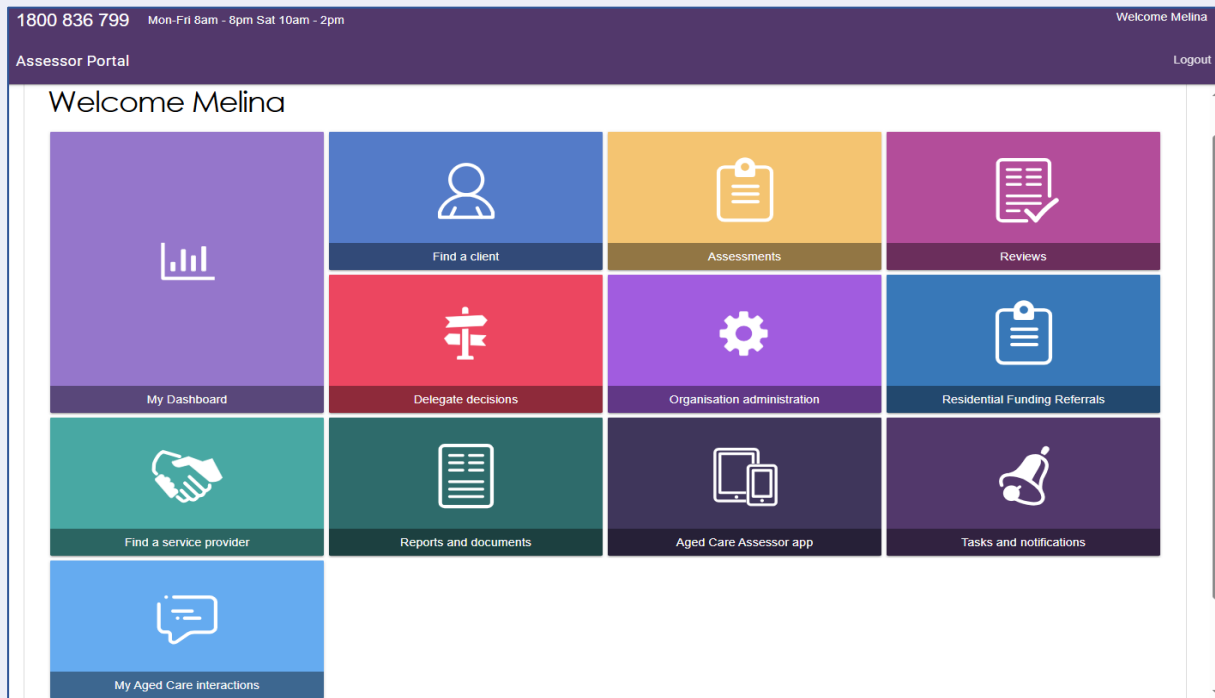
The screenshot shows the Assessor Portal home screen for a user named 'Welcome Veg'. The page has a dark purple header with the phone number '1800 836 799' and operating hours 'Mon-Fri 8am - 8pm Sat 10am - 2pm' on the left, and 'Welcome Veg' and 'Logout' on the right. Below the header, the text 'Assessor Portal' is on the left and 'Logout' is on the right. The main content area is titled 'Welcome Veg' and contains a grid of nine tiles:

- My Dashboard**: A purple tile with a bar chart icon.
- Find a client**: A blue tile with a person icon.
- Delegate decisions**: A red tile with a decision icon.
- Organisation administration**: A purple tile with a gear icon.
- Find a service provider**: A green tile with a handshake icon.
- Reports and documents**: A dark green tile with a document icon.
- Tasks and notifications**: A dark purple tile with a bell icon.
- My Aged Care interactions**: A blue tile with a speech bubble icon.

At the bottom of the page, there is a footer with links for 'Accessibility', 'Privacy', 'Disclaimer', 'Terms of use', and 'Copyright'. Below these links is the text 'Copyright © Commonwealth of Australia ABN:83 605 426 759'. On the right side of the footer, there are logos for the 'Australian Government Department of Health and Aged Care' and 'myagedcare'.

## The Assessment Delegate + Assessor dual role home screen

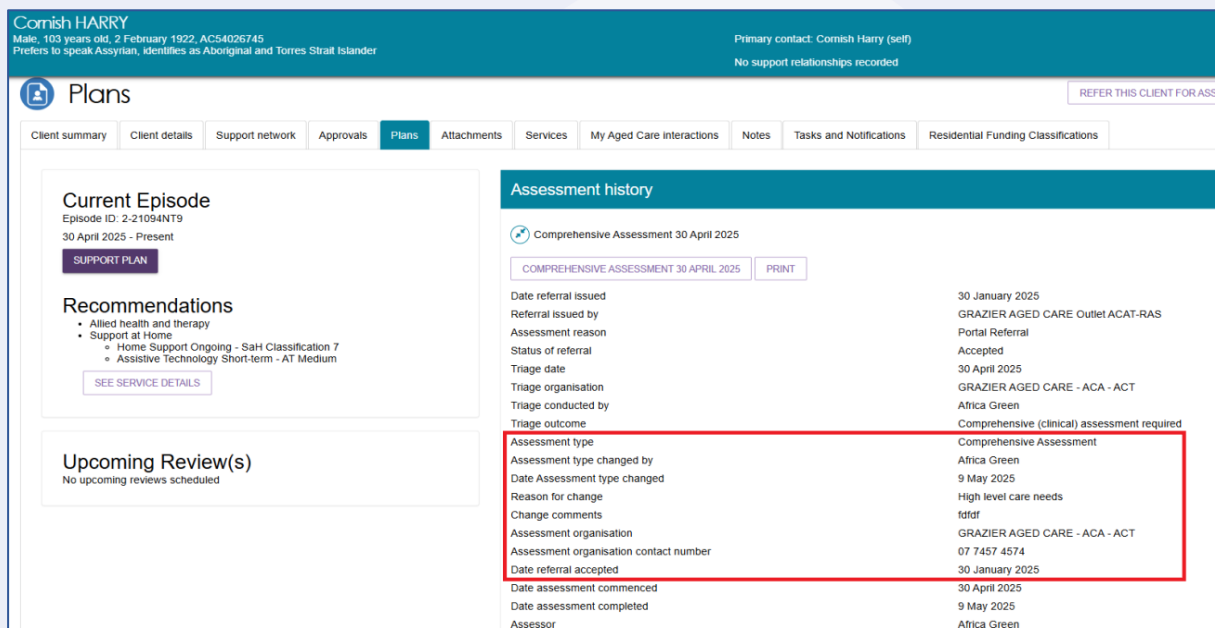
If you are both an aged care needs assessor (assessor) and an Assessment Delegate in the Assessor portal, your home screen will look like the following.



For more information regarding applying to be an Assessment Delegate please refer to the [My Aged Care – Assessor Portal User Guide 12 – Managing delegate roles](#).

## Assessment history

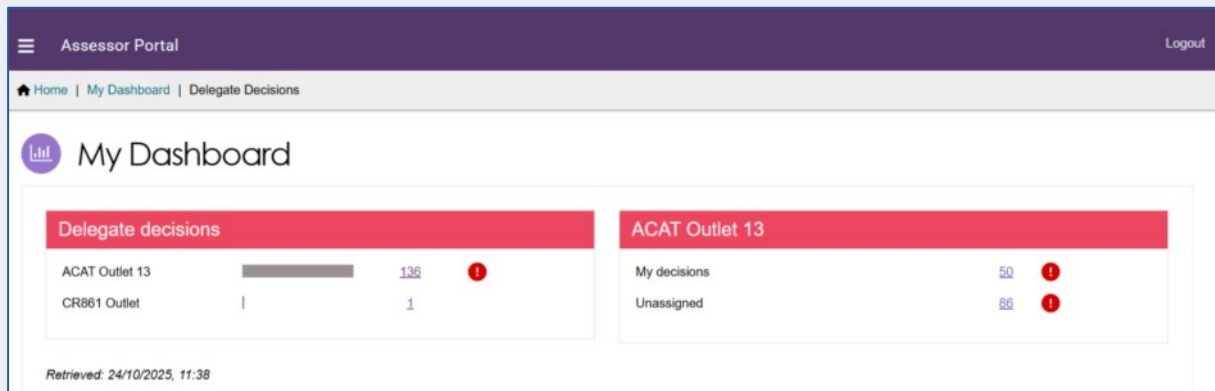
To assist Assessment Delegates with understanding and actioning delegate approvals, Assessment Delegates can view a client's assessment history via the **Plan** tab of the client record. Within the **Assessment history** section, it will outline key information such as if the assessment has been completed by a non-clinical needs assessor who then converted the assessment from a home support assessment to a comprehensive assessment, as well as the details of the clinical supervising assessor.



## Viewing an item for decision

Clinical and Non-clinical assessment delegates are able to access the Delegates Decision tile from the Assessor portal home page, the Decision Pending tab and then Decision History tab.

Delegates can get a quick overview of how many delegate decisions are in the delegate's outlet, how many are assigned to them, and how many are unassigned, by going to the **My Dashboard** tile of the Assessor portal:



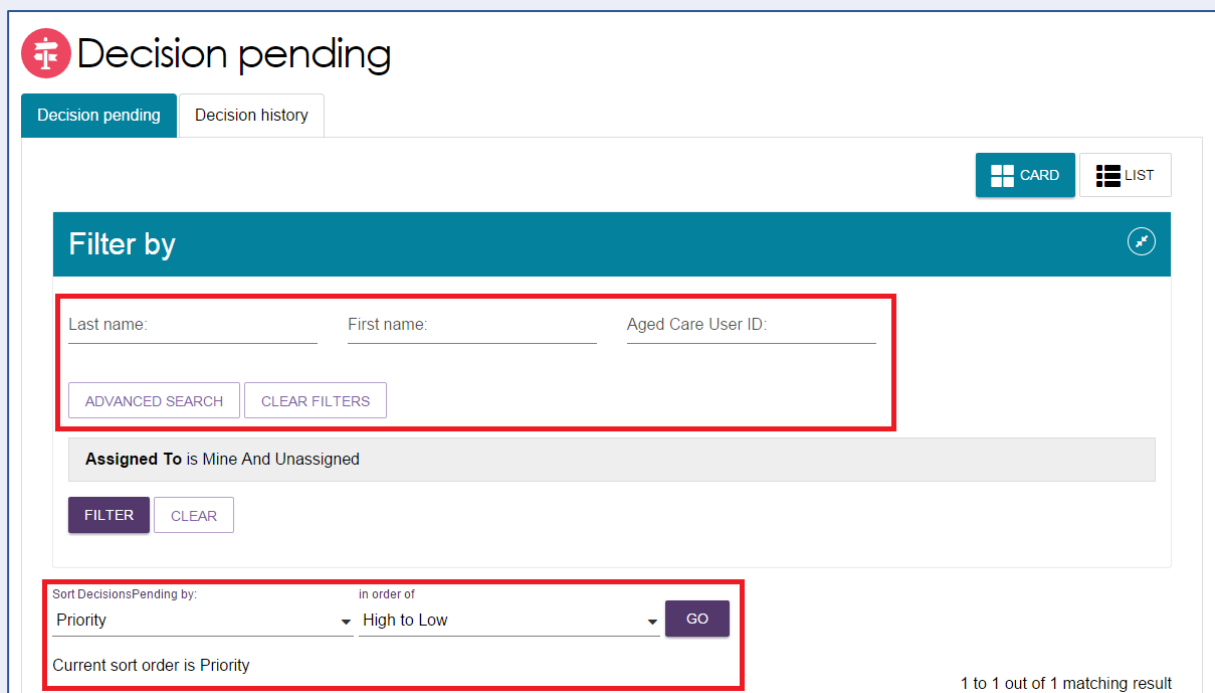
The screenshot shows the 'Assessor Portal' interface. At the top, there is a navigation bar with 'Assessor Portal' and a 'Logout' link. Below the navigation bar, there is a breadcrumb trail: 'Home | My Dashboard | Delegate Decisions'. The main content area is titled 'My Dashboard' and contains two summary cards. The first card, 'Delegate decisions', shows a bar chart for 'ACAT Outlet 13' with a value of 136 and a red notification icon, and 'CRB61 Outlet' with a value of 1. The second card, 'ACAT Outlet 13', shows 'My decisions' with a value of 50 and a red notification icon, and 'Unassigned' with a value of 86 and a red notification icon. At the bottom left of the dashboard, it says 'Retrieved: 24/10/2025, 11:38'.

Follow the steps below to view items for decision via the Delegate Decisions tile.

1. Select **Delegate decisions** from the homepage.
2. The queue containing assessments awaiting Delegate decision will be displayed in the **Decision pending** tab.

You can use the filter options (First Name, Last Name, and Aged Care User ID) to refine your results. To show additional filter options select **Advanced Search**.

You can also use the sort function to sort by assessment status, as well as other categories such as last name, first name, Aged Care ID, date submitted, priority (or urgency), assessor and delegate names and due date. The order in which the results are displayed can also be set.



The screenshot shows the 'Decision pending' tab in the Assessor Portal. The page has a teal header with the 'Decision pending' tab selected and 'Decision history' as an alternative. There are 'CARD' and 'LIST' view toggles. A 'Filter by' section is highlighted with a red box, containing input fields for 'Last name:', 'First name:', and 'Aged Care User ID:', along with 'ADVANCED SEARCH' and 'CLEAR FILTERS' buttons. Below this, there is a filter for 'Assigned To is Mine And Unassigned' with 'FILTER' and 'CLEAR' buttons. At the bottom, another red box highlights the sorting options: 'Sort DecisionsPending by: Priority' and 'in order of High to Low', with a 'GO' button. The text 'Current sort order is Priority' is displayed below the sort options. In the bottom right corner, it says '1 to 1 out of 1 matching result'.

Each Card or Listing shows the Assessment status – at the bottom of the client card or at the right side of the client listing, under the **Assessment status** column.

The due date against each assessment waiting for delegate decision will be visible to the Delegate in both the Card and List View. The pending decisions can be sorted and filtered by date due.

### Decisions Pending tab - Card View

Decision pending Currently viewing ABC Outlet

Decision pending | Decision history

CARD | LIST

Filter by

1 to 3 out of 3 matching results

Sort DecisionsPending by: Last name | in order of: Alphabetical (A-Z) | GO

#### My decisions

**Sally DENNY**

Assessor: Melina Pimentel  
Delegate: Felipe Sierra  
Aged care user ID: AC57460867  
Delegate Decision due by: 18 April 2026

⚠️ 39 days overdue | Medium

⚠️ Awaiting Delegate Decision (Assessment)

**Kim MERRY**

Assessor: Melina Pimentel  
Delegate: Felipe Sierra  
Aged care user ID: AC31311072  
Finalised Support Plan Review due by: 30 April 2026

⚠️ 27 days overdue | Low

⚠️ Awaiting Delegate Decision (Support Plan Review)

**Edmond READY**

Assessor: Melina Pimentel  
Delegate: Felipe Sierra  
Aged care user ID: AC96774450

Low

⚠️ Awaiting Delegate Decision (Undergoing Support)

### Decisions Pending tab - List View

Decision pending Currently viewing ABC Outlet

Decision pending | Decision history

CARD | LIST

Filter by

Last name | First name | Aged Care user ID

ADVANCED SEARCH | CLEAR FILTERS

Assigned to is Mine & unassigned

FILTER | CLEAR

1 to 3 out of 3 matching results

Last name	First name	Aged care user ID	Assessor full name	Delegate full name	Assessment status	Date due	Priority
DENNY	Sally	AC57460867	PIMENTEL Melina	SIERRA Felipe	Awaiting Delegate Decision (Assessment)	⚠️ 18/04/2026	Medium
MERRY	Kim	AC31311072	PIMENTEL Melina	SIERRA Felipe	Awaiting Delegate Decision (Support Plan Review)	⚠️ 30/04/2026	Low
READY	Edmond	AC96774450	PIMENTEL Melina	SIERRA Felipe	Awaiting Delegate Decision (Undergoing Support)		Low

- Also on this page is the **Decision history** tab, which will display decisions that you have made previously.

- For both the **Decision Pending** and the **Decision History** tabs, you can toggle between the card view and the list view (shown below) to display the clients.

### Assigning an item for decision

A Clinical assessment delegate can assign Comprehensive assessments and Home support assessments to themselves. They can also assign a Home support assessment to other Clinical assessment delegates or Non-clinical assessment delegates within their outlet.

A Non-clinical assessment delegate can assign Home support assessments to themselves or other Non-clinical assessment delegates within the same outlet.

To assign a client:

1. If using the **Card view**, select the expand arrows on the Client card to display a summary of the client's information in a pop-up. Select **ASSIGN**.

Home | Delegate decisions

## Decision pending

Currently viewing Aussie Healthcare

You have report(s) that are ready to be downloaded. To download, go to Reports page.

### Dick VAN DYKE

Aged 100 ( 13 December 1925 ), Male

Referred from Aussie Healthcare on 30 January 2026  
Accepted on 30 January 2026

Assessor Andy Flower  
Date submitted 30 January 2026

Delegate Decision due by: 1 February 2026

**Assessment details**

Assessment type Comprehensive Assessment  
Assessment reason Self-Referral  
Assessment setting Non-Hospital

**Recommended care:**

Home support Ongoing - SaH Classification 4

[VIEW SUPPORT PLAN](#) [VIEW FULL CLIENT RECORD](#) [VIEW CLIENT REPORT](#)

**ASSIGN**

Unassigned

Dick VAN DYKE

If using the **List view**, select the expand arrows for the client to display a summary of the client's information in an expanded view.

## Decision pending

Currently viewing Aussie Healthcare


Decision pending | Decision history

CARD LIST

Filter by [Collapse filter](#)

1 to 1 out of 1 matching result

[SHOW MORE UNASSIGNED](#)

Last name	First name	Aged care user ID	Assessor full name	Delegate full name	Assessment status	Date due	Priority
 VAN DYKE	Dick	AC94286739	FLOWER Andy		Awaiting Delegate Decision	01/02/2026	Low

2. Select **ASSIGN** to allocate that item to yourself or to another Delegate.

Decision pending Currently viewing Aussie Healthcare

Decision pending | Decision history

CARD LIST

Filter by

1 to 1 out of 1 matching result

SHOW MORE UNASSIGNED

Last name	First name	Aged care user ID	Assessor full name	Delegate full name	Assessment status	Date due	Priority
VAN DYKE	Dick	AC94286739	FLOWER Andy		Awaiting Delegate Decision	01/02/2026	Low

Aged 100 ( 13 December 1925 ), Male  
Referred from Aussie Healthcare on 30 January 2026  
Accepted on 30 January 2026  
Delegate Decision due by: 1 February 2026

Assessor Andy Flower  
Date submitted 30 January 2026

**Assessment details**  
Assessment type Comprehensive Assessment  
Assessment reason Self-Referral  
Assessment setting Non-Hospital

**Recommended care:**  
Home support Ongoing - SaH Classification 4

VIEW SUPPORT PLAN | VIEW FULL CLIENT RECORD | VIEW CLIENT REPORT

**ASSIGN**

3. In the pop-up box, select another Delegate (or yourself – 'me'), and select **ASSIGN**.

Assign delegate decision for Dick VAN DYKE

Assign to\*

Me

Roderick GROVES

Greysen WARFIELD

Africa GREEN

**ASSIGN** CANCEL

4. A confirmation message will appear. The client will appear in the queue of the Delegate they were assigned to, or under **My Decisions** if assigned to yourself.

Decision pending Currently viewing Aussie Healthcare

Decision pending | Decision history

CARD LIST

Filter by

1 to 1 out of 1 matching result

Sort DecisionsPending by: Last name in order of Alphabetical (A-Z) GO

**My decisions**

Dick VAN DYKE

Assessor: Andy Flower  
Delegate: Prospect Free  
Aged care user ID: AC94286739  
Delegate Decision due by: 1 February 2026

Due in 2 days Low

## Reassigning for decision

Follow these steps to reassign an item for decision:

1. Select the expand arrow on the **Client card** to display a summary of the client's information. Select **REASSIGN**.

**My decisions**

Dick  
**VAN DYKE**

Assessor: Andy Flower  
Delegate: Prospect Free  
Aged care user ID: AC94286739  
Delegate Decision due by: 1 February 2026

Due in 2 days

**Dick VAN DYKE**

Aged 100 ( 13 December 1925 ), Male      Referred from Aussie Healthcare on 30 January 2026  
Accepted on 30 January 2026

Assessor Andy Flower      Delegate Decision due by: 1 February 2026  
Delegate Prospect Free  
Date submitted 30 January 2026

**Assessment details**  
Assessment type Comprehensive Assessment  
Assessment reason Self-Referral  
Assessment setting Non-Hospital

**Recommended care:**  
Home support Ongoing - SaH Classification 4

[VIEW SUPPORT PLAN](#)   [VIEW FULL CLIENT RECORD](#)   [VIEW CLIENT REPORT](#)

[START DECISION PROCESS](#)   [REASSIGN](#)

If using the list view, select the expand arrow next to the client's name to see more information, and select **REASSIGN**.

Last name	First name	Aged care user ID	Assessor full name	Delegate full name	Assessment status	Date due	Priority
VAN DYKE	Dick	AC94286739	FLOWER Andy	FREE Prospect	Awaiting Delegate Decision	01/02/2026	Low

Aged 100 ( 13 December 1925 ), Male      Referred from Aussie Healthcare on 30 January 2026  
Accepted on 30 January 2026

Assessor Andy Flower      Delegate Decision due by: 1 February 2026  
Delegate Prospect Free  
Date submitted 30 January 2026

**Assessment details**  
Assessment type Comprehensive Assessment  
Assessment reason Self-Referral  
Assessment setting Non-Hospital

**Recommended care:**  
Home support Ongoing - SaH Classification 4

[VIEW SUPPORT PLAN](#)   [VIEW FULL CLIENT RECORD](#)   [VIEW CLIENT REPORT](#)

[START DECISION PROCESS](#)   [REASSIGN](#)

- Nominate another Delegate to assign the item to or select the option **Place back in delegate queue** if you want to un-assign it. Select **REASSIGN**.

### Re-assign delegate decision for Dick VAN DYKE

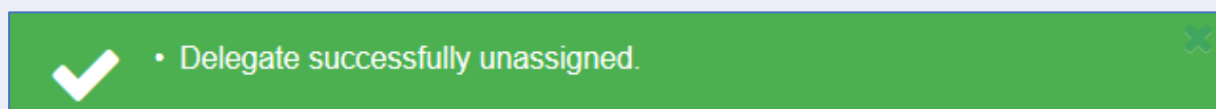
Delegate decision currently assigned to Prospect FREE

Re-assign to\*

- Roderick GROVES
- Greysen WARFIELD
- Africa GREEN
- Veg KALE
- Laticia KASPER
- Cort RICCI
- Adria OTOOLE
- Phyllis CUPP
- Place back in delegate queue

**RE-ASSIGN** CANCEL

- You will receive a confirmation message that you have either re-assigned or un-assigned the queue item.



## Recording a delegate decision

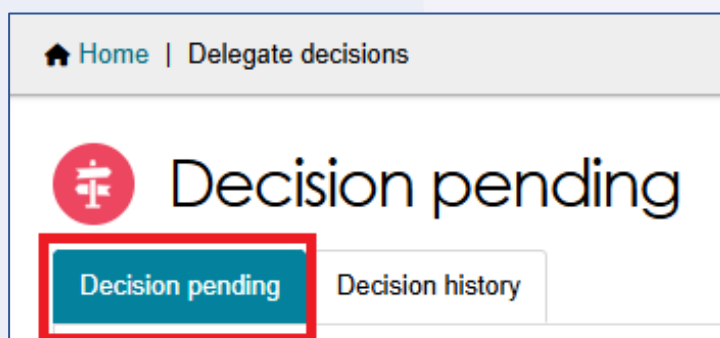
Prior to making any delegate decisions you must view the entire client record, assessment and support plan and attached information to ensure you have all the necessary evidence to support your decisions. For example:

- The assessment summary prepared by the assessor can be accessed through the **Identified needs** tab of the support plan.
- Information banners may appear in the **Client Summary** to remind you that the client is approved to access certain services.

Follow these steps to record your delegate decision:

## Viewing decisions information

- Go to the **Delegate Decisions** tile from the home page and select the **Decision Pending** tab.



- From the **Decision pending** tab, select the expand arrow on the Client card to display a summary of the client's information. |

Select **START DECISION PROCESS**. If using list view, this option is available from the expanded client information section. Select **START DECISION PROCESS** in the pop-up box.

**Dick VAN DYKE**

Aged 100 ( 13 December 1925 ), Male

Referred from Aussie Healthcare on 30 January 2026  
Accepted on 30 January 2026

Assessor Andy Flower  
Delegate Prospect Free  
Date submitted 30 January 2026

**Delegate Decision due by: 1 February 2026**

**Assessment details**

Assessment type Comprehensive Assessment  
Assessment reason Self-Referral  
Assessment setting Non-Hospital

**Recommended care:**

Home support Ongoing - SaH Classification 4

VIEW SUPPORT PLAN | VIEW FULL CLIENT RECORD | VIEW CLIENT REPORT

**START DECISION PROCESS** | REASSIGN

**[Clinical Assessors only]** If you as the delegate is also the same person who conducted the client's assessment or support plan review, then this error message will appear:

**Delegate decision information**

Delegate approval should be provided by a different person to the person who conducted the assessment or support plan review. Please confirm that there is not another delegate available to provide it.

PROCEED | CANCEL

3. You will be taken to the **Decisions** tab on the client's support plan. The recommendations made by the assessor will be displayed for your review.

### Support plan and services

PRINT COPY OF SUPPORT PLAN

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

#### IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment  
IAT Outcome: CHSP  
Recommended classification: SaH Classification 4  AGREE

Override reason: Higher level service needs  
Override reason description: Description goes here

#### Recommended care requiring delegate decision

Recommend that the client receive  
Home support

If you have also asked the assessor to [review the IAT questionnaire](#), at this point you may also receive an information message saying that the Assessor has reviewed the IAT as per your request, and that you can review the IAT review via the hyperlink attached.

### Support plan and services

PRINT COPY OF SUPPORT PLAN

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

#### IAT Outcome and Classifications

**⚠** 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.

**i** Assessor has reviewed the IAT questionnaire as per delegate's request. View the Notes to delegate on the IAT review [here](#).

Current assessment type: Comprehensive Assessment  
IAT Outcome: SaH Classification 4  
Previous IAT Outcome: SaH Classification 4  
Recommended classification: SaH Classification 4  AGREE


## Editing a recommended classification

1. Go to the **Delegate Decisions** tile, and select the client's card or listing as per the process in [Viewing Decisions information](#).
2. Select on the pencil (Edit) icon next to the current recommended classification.

### IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment

IAT Outcome: CHSP

Recommended classification: SaH Classification 4 

Override reason: Higher level service needs

Override reason description: Description goes here

3. The **Edit Recommended Classification** pop up appears.

**!** An ongoing Support at Home 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). Assessors must **not** undertake this action and delegates must not approve assessments where this occurs, or override and select a lower or higher classification.

Select the new recommended classification, along with the override reason and description.

Pay attention to any warning messages that may appear. Complete any other mandatory fields that appear, for example the client's preference for seeking Home support services.

Finally, select **SAVE TO PLAN**.

## Edit recommended classification

**!** Please contact the assessor before making any changes to the classification. Some recommendations may be removed as a result of this change. If you want to recommend a Restorative Care Pathway, End-of-Life Pathway or CHSP this will require the assessment to be returned to the assessor to add these services.

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

IAT outcome: CHSP


Recommended Classification: SaH Classification 4

Classification type: Ongoing

New recommended classification \*

To override the result, please specify the reason for the override and describe it for the delegate.

Override reason \*

Override reason description: \* 

0 / 150

4. For Support at Home classifications, the **Edit Home Support Services** Screen displays. A truncated version of this page is shown below.

The default services for your edited classification appear on this page.

Confirm or change the service, frequency and intensity details.

Then, select **SAVE TO PLAN** at the bottom of the page.

## Edit Home Support Services

All fields marked with an asterisk ( \* ) must be completed before submission

Recommended that the client receive: SaH Classification 4  
Classification Type: Ongoing

Please select services within each service type\*

### Allied health and therapy

Service	Frequency	Intensity
<input type="checkbox"/> Aboriginal or Torres Strait Islander Health Practitioner assistance	_____	_____ ▾
<input type="checkbox"/> Aboriginal or Torres Strait Islander Health Worker assistance	_____	_____ ▾
<input type="checkbox"/> Allied health assistance	_____	_____ ▾

5. The screen under the decisions tab will show the updated **Recommended classification** under **IAT Outcome and Classifications**. It can take up to 60 seconds for the update to take effect.
6. For **Residential Permanent recommendations**, a Clinical Assessment Delegate can make corrections to their decisions within 43 days. During the correction you can:
- add a residential permanent recommendation
  - remove a residential permanent recommendation
  - update urgency
  - update approval expiry date
  - update emergency needs
  - update Delegate date (approval start date).

## Viewing details about existing approvals

1. To view details and status of the decision for a recommended service, navigate to the **Decisions** tab and scroll to the **Current care approvals** section.

Select the expander icon next to the service and select the blue magnifier icon to view.

The screenshot shows the 'Support plan and services' interface. The 'Decisions' tab is selected. Under 'IAT Outcome and Classifications', the current assessment type is 'Comprehensive Assessment' and the existing classification is 'Transitioned HCP Level 3 (Pending allocation)'. The 'Current care approvals' section is highlighted, showing 'Residential Respite Care' with a priority of 'Low' and an approval start date of '30 May 2025'. A red box highlights the 'Recommend that the client receive Home support' checkbox, which is checked. Below this, the classification is 'Transitioned HCP Level 3', the type is 'Ongoing', and the priority category is 'Standard'. A blue magnifier icon is visible in the bottom right corner of the 'Home support' details.

2. A pop-up screen will open listing the classification and the type along with the list of all approved services.

The screenshot shows a pop-up window titled 'Home support services'. At the top, it displays 'Classification: SaH Classification 4' and 'Classification Type: Ongoing'. Below this is a list of services with expandable icons: Care management, Domestic assistance, Home maintenance and repairs, Home or community general respite, Meals, Nursing care, Nutrition, Personal care, Social support and community engagement, and Transport. A 'CLOSE' button is located at the bottom right.

3. Select the expander icon to view the details such as services included, approval start date and ceasing date.

The screenshot shows the 'Home support services' pop-up window with detailed information for selected services. The classification is 'SaH Classification 2' and the type is 'Ongoing'. Under 'Care management', it lists 'Home support care management' with an approval start date of '05/05/2025' and a status of 'Agreed'. Under 'Home or community general respite', it lists 'Community and centre-based respite' with an approval start date of '05/05/2025' and a status of 'Agreed', and 'Flexible respite' with an approval start date of '05/05/2025'. A 'CLOSE' button is at the bottom right.

## Returning an assessment to an assessor

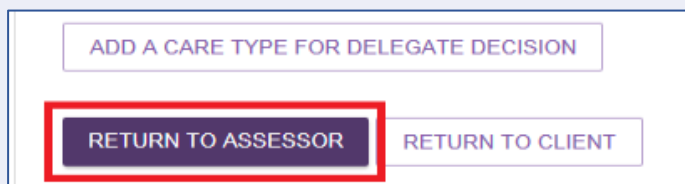
There are circumstances in which you may wish to send the client's assessment back to the assessor. For example:

- more evidence is required
- the care level is not appropriate or sufficient
- amendments needed to be made (such as to correct spelling errors)
- if the Integrated Assessment Tool (IAT) data needs to be reviewed for both Comprehensive and Home Support Assessments
- accidental errors with service approvals in the support plan

By selecting **RETURN TO ASSESSOR**, the original assessor can then make necessary changes to the support plan or IAT before re-submitting for decision.

You can only return the assessment to the assessor prior to agreeing or disagreeing to any recommendations.

If you select **RETURN TO CLIENT**, you will navigate back to the client's record.



Follow these steps to return the assessment to the assessor:

1. From the **Delegate Decisions** tile, Go to the **Decisions** tab of the client's Support Plan and Services page. Select **RETURN TO ASSESSOR** at the bottom of the page.

A screenshot of a web application interface for 'Support plan and services'. The breadcrumb trail shows 'Home | Delegate decisions | Kim MERRY support plan and services'. The client's name is 'Mrs Kim MERRY', with details: 'Female, 88 years old, 1 July 1937, AC31311072, 12 BUNNY STREET WESTON, ACT, 2611'. The primary contact is 'Kim Merry (self)' and there are 'No support relationships recorded'. The main heading is 'Support plan and services' with a 'PRINT COPY OF SUPPORT PLAN' button. Below the heading are tabs: 'Identified needs', 'Goals &amp; recommendations', 'Decisions' (highlighted with a red box), 'Manage services &amp; referrals', and 'Associated People'. The 'Decisions' tab content includes: 'IAT Outcome and Classifications', 'Recommended care requiring delegate decision' (with two items: 'Meals' and 'Home maintenance and repairs'), and 'Delegate decisions and comments' (with one item: 'Assessment: Submitted on 13 April 2026'). At the bottom of the 'Decisions' tab are buttons: 'ADD A SERVICE RECOMMENDATION', 'RETURN TO ASSESSOR' (highlighted with a red box), and 'RETURN TO CLIENT'.

2. The **Return to assessor** pop up appears.

If you are returning the assessment to the assessor to review and update the support plan only, select **Return Assessment**. You can return to assessor for support plan amendments multiple times.

**Return to assessor**

You are returning this assessment to the assessor. Any decisions you have marked as 'agree' or 'disagree' will be removed and must be actioned again when the assessment is resubmitted.

You are about to return the assessment for Sam Stewart to the assessor with no delegate decision. If you are returning the assessment to the assessor to review and amend data entered into the IAT, please select the checkbox below and then select 'Return Assessment'. If you are returning the assessment to the assessor to review and update the support plan only, please select 'Return Assessment'

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

Does the assessor need to review IAT?

**RETURN ASSESSMENT** CANCEL

A green banner appears stating that the support plan has been returned to the assessor. The client's card or listing disappears from your **Decision Pending** page.

The support plan has been returned to the Assessor

3. To ask the assessor to review the IAT, select the tick box next to **Does the assessor need to review IAT?**. It will display a warning that decisions will be cleared.

You can only request an IAT review once.

**Return to assessor**

You are returning this assessment to the assessor. Any decisions you have marked as 'agree' or 'disagree' will be removed and must be actioned again when the assessment is resubmitted.

You are about to return the assessment for Sam Stewart to the assessor with no delegate decision. If you are returning the assessment to the assessor to review and amend data entered into the IAT, please select the checkbox below and then select 'Return Assessment'. If you are returning the assessment to the assessor to review and update the support plan only, please select 'Return Assessment'

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

Does the assessor need to review IAT?

**RETURN ASSESSMENT** CANCEL

- The pop up expands to display a section to complete your IAT review notes to the assessor. The IAT domain names are pre-filled for your convenience.

You can type in any text up to 2500 characters against the relevant IAT domains as per the example below.

Then, select **RETURN ASSESSMENT**.

**Return to assessor**

You are returning this assessment to the assessor. Any decisions you have marked as 'agree' or 'disagree' will be removed and must be actioned again when the assessment is resubmitted.

**You can only request a review of the IAT questions once.**

You are about to return the assessment for John Smith to the assessor with no delegate decision. If you are returning the assessment to the assessor to review and amend data entered into the IAT, please select the checkbox below and then select 'Return Assessment'. If you are returning the assessment to the assessor to review and update the support plan only, please select 'Return Assessment'.

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

Does the assessor need to amend the IAT?

*Instructions: Complete instructions for the assessor against the relevant IAT domains below, outlining the IAT data that needs to be reviewed.*

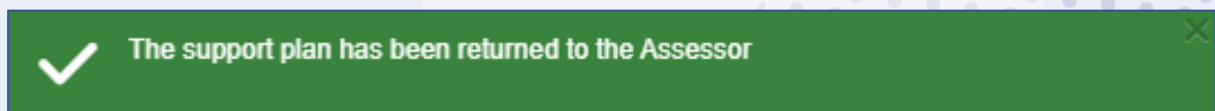
Notes to assessor: \*

Assessment Details:  
Reason for Assessment:  
Carer profile:  
Medical and Medications:  
Function:  
Physical, Personal Health & Frailty:  
Social:  
Cognition:  
Behaviour:  
Psychological:  
Home & Personal Safety:  
Financial or Legal:  
Support Considerations:  
Validated Assessment Tools:  
Other:

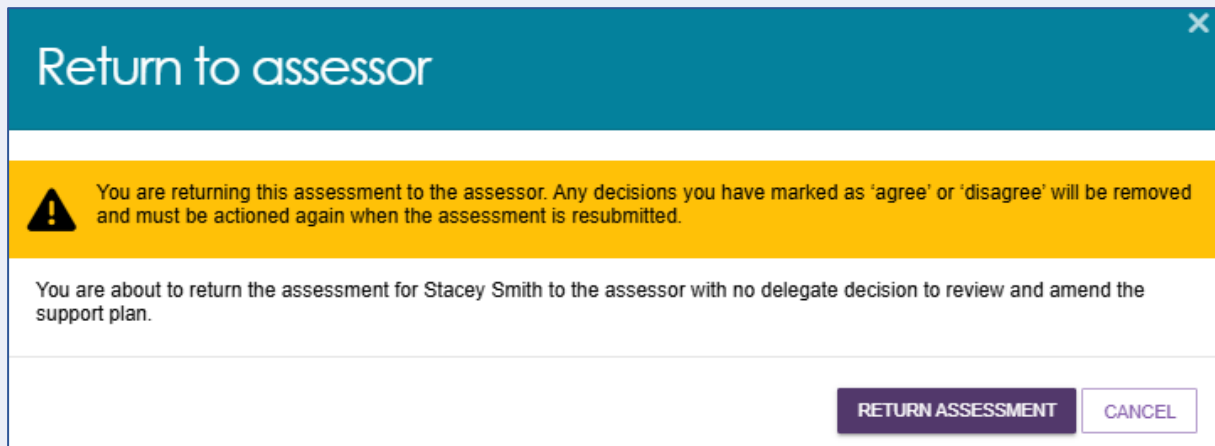
0/2500

**RETURN ASSESSMENT** CANCEL

- A green banner appears stating that the support plan has been returned to the assessor. The client's card or listing disappears from your **Decision Pending** page.



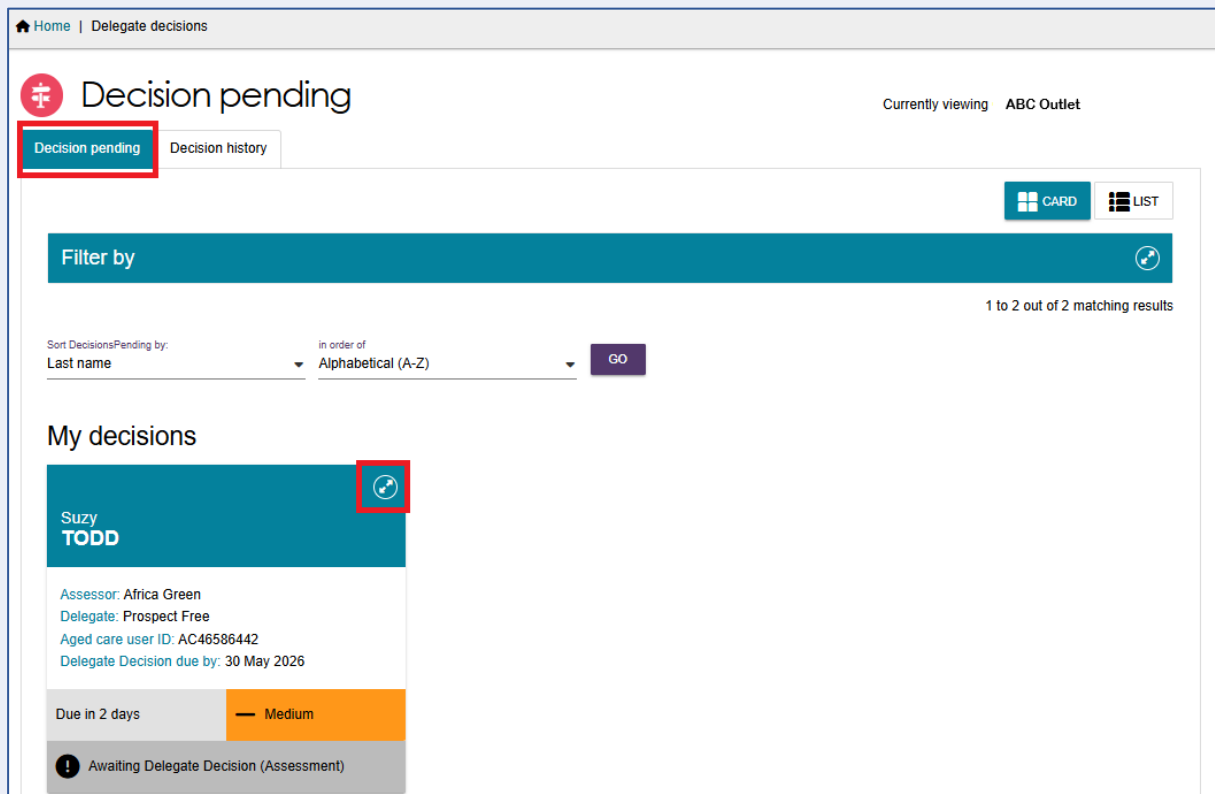
6. If the assessment has already been returned for IAT amendment, the modal will display as below:
  - Warning that decisions will be cleared
  - Text only mentions returning for Support Plan amendment. Click 'Return Assessment' to request support plan amendments
  - Checkbox no longer displays.



## Receiving reviewed IAT from assessor

Once the assessor completes the requested changes from the returned IAT, re-finalises the IAT, and resubmits the support plan, the delegate then is able to view any notes that the assessor made before restarting the decision process.

1. Find the client from the **Delegate Decisions** tile, then the Decision pending tab. Select the client's card or listing.



2. An Information message appears: 'Assessor has reviewed the IAT questionnaire as per delegate's request. Please refer to the Notes to delegate on the IAT review below for details'.  
Select **VIEW DETAILS** below **Notes to delegate on the IAT review**.

**Suzy TODD**

**i** Assessor has reviewed the IAT questionnaire as per delegate's request. Please refer to the **Notes to delegate on the IAT review** below for details.

Aged 83 ( 15 June 1942 ), Female      Referred from Aged Care Gateway on 21 April 2026  
Accepted on 14 May 2026

Assessor      Africa Green      Delegate Decision due by: **30 May 2026**

Delegate      Prospect Free      **Notes to delegate on the IAT review**

Date submitted      28 May 2026      [VIEW DETAILS](#)

**Assessment details**

Assessment type      Comprehensive Assessment

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

Assessment setting      Non-Hospital

**Recommended care:**

- Transport
- Personal care
- Meals
- Residential Permanent
- Domestic assistance

[VIEW SUPPORT PLAN](#)   [VIEW FULL CLIENT RECORD](#)   [VIEW CLIENT REPORT](#)

[START DECISION PROCESS](#)   [REASSIGN](#)

3. The **Notes to delegate on the IAT review** pop up appears. You can view the assessor's notes to the delegate at the top, and the original delegate's notes to the assessor below.  
Select the expander icon to expand or close each section.  
Select **CLOSE** to return to the client's record.

**Notes to delegate on the IAT review**

**Notes to delegate:**

- Assessment Details:
- Reason for Assessment:
- Carer profile:
- Medical and Medications:
- Function:
- Physical, Personal Health & Frailty:
- Social:
- Cognition:
- Behaviour:
- Psychological:
- Home & Personal Safety:
- Financial or Legal:
- Support Considerations:
- Validated Assessment Tools:
- Other:

**Notes to assessor:**

[CLOSE](#)

- From the client's card or list view, select **START DECISION PROCESS** to start/restart the decision process.

The **Decisions** page appears. This time it displays the updated support plan (if completed), the updated IAT outcome, and the previous IAT outcome (if applicable).

You can also view the assessor's IAT Notes from here. Select the hyperlink in the Information message: 'Assessor has reviewed the IAT questionnaire as per delegate's request. View the Notes to delegate on the IAT review [here](#)'.

**Support plan and services** PRINT COPY OF SUPPORT PLAN

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

### IAT Outcome and Classifications

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.

Assessor has reviewed the IAT questionnaire as per delegate's request. View the Notes to delegate on the IAT review [here](#).

Current assessment type: Comprehensive Assessment

IAT Outcome: CHSP

Previous IAT Outcome: CHSP

Recommended classification: CHSP

## No Care Approval and No Change to Existing Care Approvals

No Care Approval and No Change to Existing Care Approvals are available as buttons, for both Home Support Assessments and Comprehensive Assessments. These buttons are available in the client's Goals & Recommendations tab of the Support Plan and Services page. They can also appear whilst adding a Goal.

No Care Approval appears if the client has no previous approval records. No Care to Existing Care Approvals appears if the client has previous approval records.

This image below shows the **Add No Change to Existing Care Approvals** button, in the Other Recommendations section of the client's Goals & Recommendations tab.

**Support plan and services**

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

### IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment Existing classification: CHSP

IAT Outcome: CHSP

Recommended classification: CHSP

### Client concerns and goals

ADD AREA OF CONCERN

No client concerns or goals

### Other recommendations

ADD A GENERAL RECOMMENDATION | ADD A SERVICE RECOMMENDATION | ADD RECOMMENDED LONG TERM LIVING ARRANGEMENT | ADD A CARE TYPE FOR DELEGATE DECISION

RECOMMEND A PERIOD OF REABLEMENT | **ADD NO CHANGE TO EXISTING CARE APPROVALS**

This image below shows the **Add No Care Approval** button, in both the Goal section and in the Other Recommendations section of the client's Support Plan and Services page.

Client concerns and goals

ADD AREA OF CONCERN

Concern:  
Mobility within the home

ADD A GOAL

Goal: To get around their home easily without as much assistance

Most relevant domain that goal area relates to:  
• Physical function

Client's current strengths and abilities in relation to this goal:  
Info here

Client's current areas of difficulty or activities where the client needs support in order to achieve this goal:  
Info here

Support the client's carer provide to achieve this goal:  
Info here

Focus of the goal for the client:  
• To regain a function (e.g can be physical, cognitive or social)

Motivation to achieve: 1

Status: In Progress

Recommendations

Add to this goal:

ADD A GENERAL RECOMMENDATION ADD A SERVICE RECOMMENDATION RECOMMEND A PERIOD OF LINKING SUPPORT RECOMMEND A PERIOD OF REABLEMENT

LINK TO AN EXISTING RECOMMENDATION ADD NO CARE APPROVAL

Other recommendations

ADD A GENERAL RECOMMENDATION ADD A SERVICE RECOMMENDATION RECOMMEND A PERIOD OF LINKING SUPPORT RECOMMEND A PERIOD OF REABLEMENT ADD NO CARE APPROVAL

COMPLETE SUPPORT PLAN RETURN TO CLIENT

Assessors are able to recommend No Care Approval or No Change to Existing Care Approval during the assessment period. These will require delegate decision. No Care Approval or No Change to Existing Care Approvals are not available during the support period or the support plan review.

## Clinical Delegate workflow process

Clinical assessment delegates are delegated the authority under the Act to approve an older person for all service groups, classification types and classification levels.

### ! Clinical Delegate requirements for Comprehensive (CHSP only) assessment outcomes

When a comprehensive assessment results in a CHSP only outcome, the approval must be completed by a clinical delegate who is different to the clinical assessor.

A clinical assessor must not approve their own comprehensive assessment.

All comprehensive assessments - regardless of the outcome - require separation between the assessor and delegate roles. This ensures that appropriate clinical governance and oversight for comprehensive assessments is maintained.

The *only* situation where an assessor may also be the delegate is when completing a Home Support Assessment that results in a CHSP only recommendation.

! Clinical Assessment Delegates can approve entry-level home support services (as non-clinical assessment delegates do) if assessment organisations have chosen to allocate home support assessments to clinical assessment delegates.

## Agreeing with recommendations

1. To agree with the clinical assessor's recommendation for a non Support at Home (Residential Care, TCP, CHSP etc.) recommendation, select **AGREE** below the recommended care type. If multiple care types were recommended, you will need to repeat this process for each care type.

To agree with a Support at Home service recommendation, refer to [Agreeing or disagreeing with a Support at Home Recommendation](#).

**Maria MANNING**  
Female, 88 years old, 1 July 1936, AC04710703  
11 SMITH STREET BEVERLEY, WA, 6304  
Prefers to speak Italian

Primary contact: Maria Manning (self)  
No support relationships recorded

### IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment  
IAT Outcome: SaH Classification 4  
Recommended classification: SaH Classification 4  Agreed   
HM Medium

#### Recommended care requiring delegate decision

**Residential Respite Care**

Priority for this care type: High   
Declaration: Yes  
Reason DEMMI not completed: information unavailable. Need to follow up in 1 week

**This recommendation is awaiting delegate decision**

**Residential Permanent**

Urgency for this care type: Medium   
 Agreed

**This recommendation requires a delegate decision**

Home Modification Tier: HM Medium  
Classification type: Short-term  
Home modifications services: **Home adjustments:** Home modification products, Home modifications prescription and clinical support

2. You will be asked to confirm that you agree with the recommendation in a pop-up box. If required, you can enter an approval cease date and add comments.

Select **AGREE**.

## Agree with recommendation

You are about to agree with the recommendation for Maria MANNING for Residential Respite Care

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

Approval cease date:    
(e.g. dd/mm/yyyy)

Comments (optional)

3. A confirmation message will display, and the status of the recommendation will display as **Agreed**.

**Residential Permanent**

Urgency for this care type Medium ?

Approval starts 26 May 2025

Approval stops 30 September 2025

Agreed

CHANGE

### ! Reissuing CHSP Referrals – Urgent Services

All clients who have accessed urgent services are required to complete an assessment, *and* new referrals must be generated for any approved ongoing CHSP services.

- CHSP providers will continue to deliver urgent services until an assessment is completed.
- When ongoing CHSP services are approved, the *urgent service referral should end*.
- New CHSP referrals are required for the provider to continue delivering services on an ongoing basis.
- Where a delegate does not approve the urgent service:
  - If the service has not commenced, the direct-to-provider referral will be recalled.
  - If the service has commenced, the provider will be notified that the urgent service is not approved and should cease urgent service provision.

### Disagreeing with recommendations

Disagreeing with a recommendation will result in a non-approval of that recommended care type.

If a recommendation is mistakenly added by the assessor, the delegate can disagree with the assessor's recommendation, and/or add their own recommendation.

- ! An ongoing Support at Home 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). Assessors must **not** undertake this action and delegates must not approve assessments where this occurs, or override and select a lower or higher classification.

**Recommended care requiring delegate decision**

---

**Residential Respite Care**

Priority for this care type High ?

Declaration Yes

Reason DEMMI not completed information unavailable. Need to follow up in 1 week

Delegate comment Not required

Disagreed

CHANGE

---

**Residential Permanent**

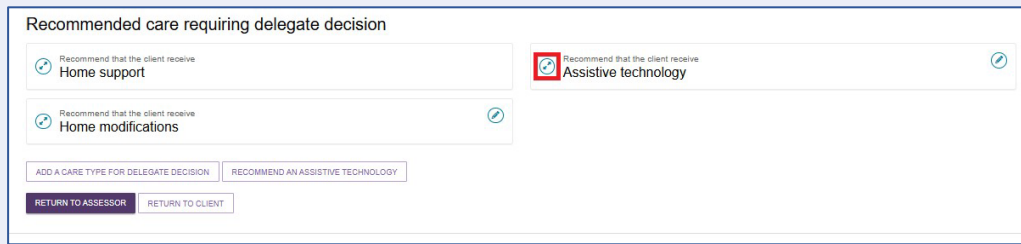
Urgency for this care type Medium ?

Agreed

CHANGE

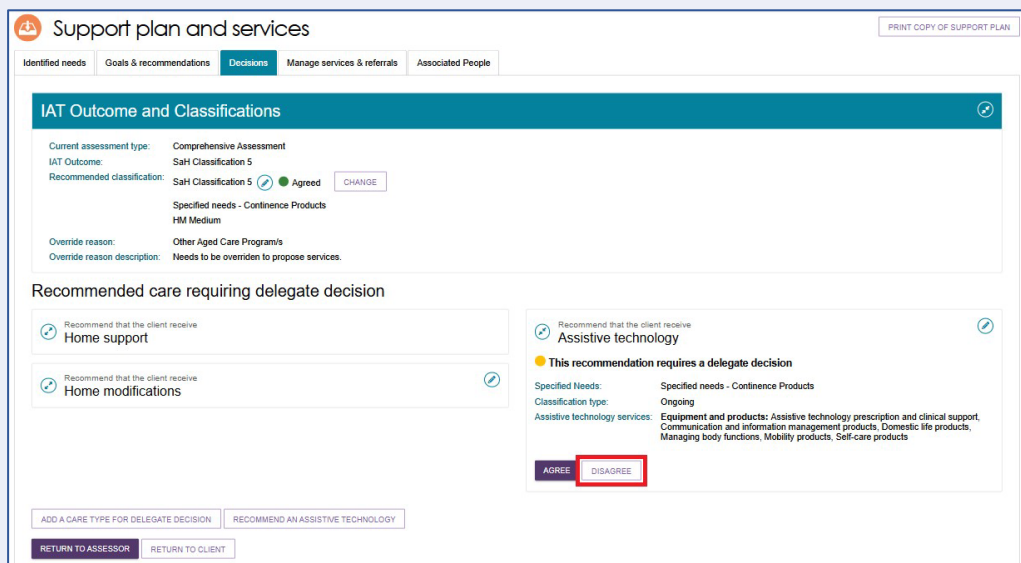
Follow the steps below to disagree with a recommendation:

1. Select the expander button to show the recommended care type for approval.

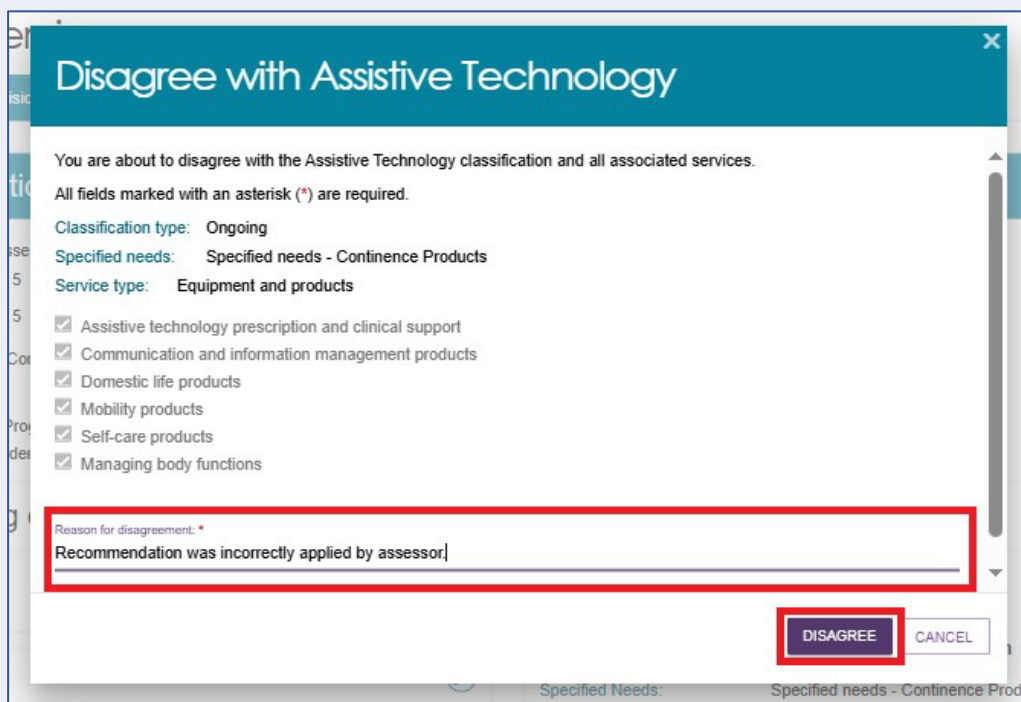


2. Select **DISAGREE** below the recommended care type.

You will need to repeat this process for each care type that you disagree with.



3. You will need to provide a comment about your reason for disagreeing with the recommendation, then select **DISAGREE**.



4. A confirmation message will display, and the status of the recommendation will change to **Disagreed**.

Recommended care requiring delegate decision

Recommend that the client receive  
Home support

Recommend that the client receive  
Home modifications

Recommend that the client receive  
Assistive technology

Specified Needs: Specified needs - Continence Products  
Classification type: Ongoing  
Assistive technology services: Equipment and products: Assistive technology prescription and clinical support, Communication and information management products, Domestic life products, Managing body functions, Mobility products, Self-care products

**Disagreed**

CHANGE

ADD A CARE TYPE FOR DELEGATE DECISION RECOMMEND AN ASSISTIVE TECHNOLOGY

RETURN TO ASSESSOR RETURN TO CLIENT

✓ Your request has successfully been processed.

5. If you need to change your decision, you can select **CHANGE**. This option will only be available prior to saving and completing the approval process by selecting **Save and Delegate**. Refer to the [Changing a Decision](#) section for more details.

Change decision

You are about to change the recommendation from agreed to **disagreed** for Maria MANNING for Residential Permanent

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

Comments or reason for disagreement \*  
Maximum 255 characters

CHANGE CANCEL

6. If you disagree with all recommendations and you do not add any new approval decisions, you may be prompted to select **No Care Approval** as a service type during the **Save Decision and Delegate** pop-up in order to complete the delegate decision.

Go to [No Care Approval and No Change to Existing Care Approvals](#) for more information.

Save decision and delegate

A service type of 'No Care Approval' or 'No change to existing care approvals' is required with Delegate confirmation as Yes if none of the services are approved.

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

You are about to save the delegate decision under the Aged Care Act 2024 for Maria Manning.

The following care was **not agreed**:

- Residential Permanent (Medium)
- Residential Respite Care

Home Support Ongoing - SaH Classification 6

Delegation date \*  
27/05/2025

SAVE DECISION CANCEL

## Agreeing or disagreeing with a Support at Home Recommendation

1. For a client that has been recommended for an ongoing Support at Home classification, you will be required to select **APPLY DELEGATE DECISION** to the assessor's recommended Home support services.

### Recommended care requiring delegate decision

Recommend that the client receive  
**Home support**

**This recommendation requires a delegate decision**

Classification: SaH Classification 2  
 Classification type: Ongoing  
 Client's preference for Home support services: Seeking services CHANGE

Home support services: **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 assistant 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

**APPLY DELEGATE DECISION**

ADD A SERVICE RECOMMENDATION ADD A CARE TYPE FOR DELEGATE DECISION ADD NO CARE APPROVAL RECOMMEND AN ASSISTIVE TECHNOLOGY

RETURN TO ASSESSOR RETURN TO CLIENT

2. You will be shown all the assessor's recommended service type/s, service/s, frequency and the intensity of the services.

You can either agree or disagree by selecting individual service/s, multiple services, or selecting the **Select all** toggle, then select **AGREE WITH SELECTED SERVICES**, or **DISAGREE WITH SELECTED SERVICES**.

The below image shows a truncated example of Home support services available.

### Apply delegate decision for home support services

Recommended that the client receive: SaH Classification 2  
 Classification type: Ongoing

Select all  
AGREE WITH SELECTED SERVICES DISAGREE WITH SELECTED SERVICES

Service type	Service	Frequency	Intensity	Recommended to	Decision	Select
Care management	Home support care management			Add new service	Disagreed	<input type="checkbox"/>
Domestic assistance	General house cleaning			Add new service	Agreed	<input type="checkbox"/>
Domestic assistance	Laundry services			Add new service	Disagreed	<input type="checkbox"/>
Domestic assistance	Shopping assistance			Add new service	Pending	<input checked="" type="checkbox"/>
Home maintenance and repairs	Assistance with home maintenance and repairs			Add new service	Pending	<input checked="" type="checkbox"/>
Home maintenance and repairs	Expenses for home maintenance and repairs			Add new service	Pending	<input checked="" type="checkbox"/>
Home maintenance and repairs	Gardening			Add new service	Agreed	<input type="checkbox"/>

FINISH ADD HOME SUPPORT SERVICES CANCEL

- To individually agree, disagree or update a service, select the expander icon and then select **AGREE**, **DISAGREE**, or **UPDATE SERVICE**.

In the **Update service** pop up, you can enter or update a service frequency or intensity.

Select **UPDATE** to save the service.


The updated frequencies and intensities are shown at the **Apply delegate decision for home support services** page.

Service type	Service	Frequency	Intensity	Recommended to	Decision	Select
	Care management	Home support care management	2	Hours per month	Add new service	<input checked="" type="radio"/> Agreed <input type="checkbox"/>
	Domestic assistance	General house cleaning	4	Hours per week	Add new service	<input checked="" type="radio"/> Agreed <input type="checkbox"/>
	Domestic assistance	Laundry services	2	Days per week	Add new service	<input checked="" type="radio"/> Agreed <input type="checkbox"/>

- If you disagree with the service/s that the assessor has recommended, after selecting **DISAGREE WITH SELECTED SERVICES**, you will be asked to provide the reason for your disagreement. Then, select **DISAGREE**.

- If you are agreeing with the recommendations by the assessor, tick the services' checkbox and select **AGREE WITH SELECTED SERVICES** button. These services will include any frequencies and intensities added by you.

It should be noted that if you select a service that you have previously disagreed with, it will override your decision.

 **Apply delegate decision for home support services**

Recommended that the client receive: SaH Classification 3  
Classification type: Ongoing

Select all

**AGREE WITH SELECTED SERVICES**    DISAGREE WITH SELECTED SERVICES

Service type	Service	Frequency	Intensity	Recommended to	Decision	Select
Care management	Home support care management	2	Hours per month	Add new service	Agreed	<input type="checkbox"/>
Domestic assistance	General house cleaning	4	Hours per week	Add new service	Disagreed	<input checked="" type="checkbox"/>
Domestic assistance	Laundry services	2	Days per week	Add new service	Disagreed	<input checked="" type="checkbox"/>
Domestic assistance	Shopping assistance			Add new service	Agreed	<input type="checkbox"/>
Home maintenance and repairs	Assistance with home maintenance and repairs			Add new service	Disagreed	<input type="checkbox"/>
Home maintenance and repairs	Expenses for home maintenance and repairs			Add new service	Agreed	<input type="checkbox"/>
Home maintenance and repairs	Gardening			Add new service	Disagreed	<input type="checkbox"/>
Home or community general respite	Community and centre-based respite			Add new service	Agreed	<input type="checkbox"/>
Home or community general respite	Flexible respite			Add new service	Agreed	<input type="checkbox"/>
Meals	Meal delivery			Add new service	Disagreed	<input checked="" type="checkbox"/>

Then, you will be asked to confirm by selecting the **AGREE** button.


**Agree with selected services**

You are about to **agree** with the service recommendations listed below

- Domestic assistance**
  - General house cleaning:** Recommended frequency is 4 hours per week. Recommendation to: add service
  - Laundry services:** Recommended frequency is 2 days per week. Recommendation to: add service
- Meals**
  - Meal delivery:** Recommendation to: add service

**AGREE**    CANCEL

- During this process, you can add additional Support at Home services that are not already listed on the page by selecting the **ADD HOME SUPPORT SERVICES** button at the bottom of the page.

 **Social support and community engagement**

**FINISH**    **ADD HOME SUPPORT SERVICES**    CANCEL

- The **Add Home Support services** page appears, where you can add additional Support at Home service/s, frequency and intensity. When finished, select the **SAVE TO PLAN** button.

Service	Frequency	Intensity
<input type="checkbox"/> Podiatry		
<input checked="" type="checkbox"/> Social work	2	Time(s) per year
<input type="checkbox"/> Speech pathology		
<input type="checkbox"/> Physiotherapy		
<input type="checkbox"/> Psychology		
<input type="checkbox"/> Music therapy		
<input type="checkbox"/> Diet or nutrition		
<input checked="" type="checkbox"/> Allied health assistance	2	Days per month
<input type="checkbox"/> Aboriginal or Torres Strait Islander Health Practitioner assistance		
<input type="checkbox"/> Aboriginal or Torres Strait Islander Health Worker assistance		
<input type="checkbox"/> Exercise physiology		
<input checked="" type="checkbox"/> Occupational therapy	2	Days per week
<input type="checkbox"/> Counselling or psychotherapy		

**SAVE TO PLAN** CANCEL

- Review the services you have added and select **FINISH** once you are ready to proceed to delegate.

Allied health and therapy Allied health assistance

**FINISH** ADD HOME SUPPORT SERVICES CANCEL

- You will be taken back to the Decisions tab of the client's Support Plan and Services page.

At this point in time, the list of Home Support services are still reflecting the intended recommendation from the assessor, prior to delegate decision.

To view what you have decided, select the **Magnifying Glass (view) icon** on the right hand side of the **Recommend that the client receive Home support** section.

Select **SAVE AND DELEGATE** at the bottom of the page, to finalise your delegation.

Recommended care requiring delegate decision

Recommend that the client receive Residential Respite Care

Recommend that the client receive Home support

Classification: SaH Classification 3

Classification type: Ongoing

Client's preference for Home support services: Seeking services

Home support services: 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 assistant clinical care, Nursing care consumables, Registered nurse clinical care  
 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

CHANGE

Recommend that the client receive Assistive technology

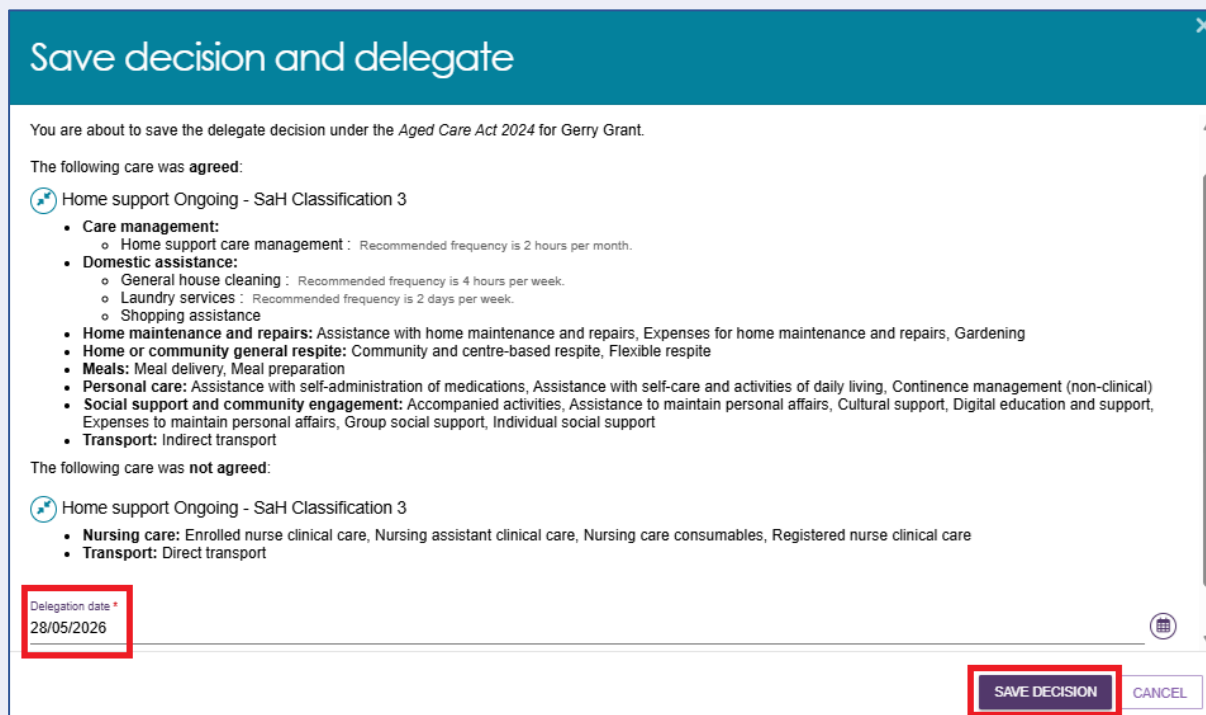
ADD A SERVICE RECOMMENDATION ADD A CARE TYPE FOR DELEGATE DECISION ADD NO CARE APPROVAL RECOMMEND AN ASSISTIVE TECHNOLOGY RECOMMEND HOME MODIFICATIONS

**SAVE AND DELEGATE** RETURN TO ASSESSOR RETURN TO CLIENT

10. The Save decision and delegate pop up appears.

It will list all services that are agreed by you, including any frequencies and intensities that were updated by you. It will also list all the services that are not agreed.

Enter the delegation date, and then select **SAVE DECISION**.

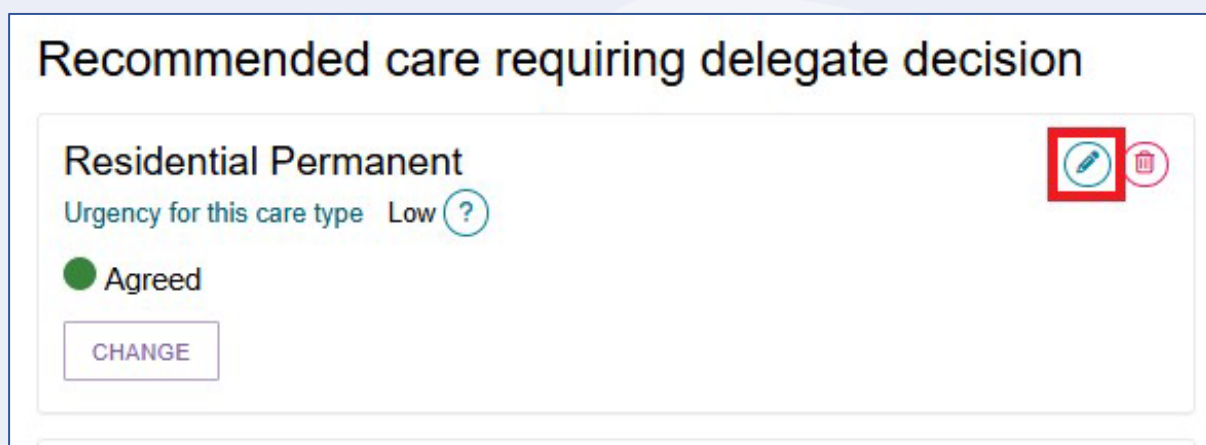


11. The client's Support Plan and Services page now shows the approval start date.

You can now [generate Notice of Decision letters](#), and [Request/change notification of Support at Home correspondence](#).

### Editing a recommendation

1. To edit a care type or level of care recommended by an assessor, select the **Edit** icon to the right of the recommendation.



2. The **Edit a care type** pop up will be displayed, and you will be able to make any changes required. Select **SAVE TO PLAN** to save the changes.

**Edit a care type**

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

Which care type applies?  
Residential Permanent

Shared room + ensuite  
 Shared room + no bathroom or ensuite  
 Shared room + shared bathroom  
 Single room + ensuite  
 Single room + no bathroom or ensuite  
 Single room + shared bathroom

If time-limited, when does the approval stop (optional)  
(e.g. dd/mm/yyyy)

What is the urgency of this care type? \* ?  
Low

Is this emergency care?  
 Yes  No

Reason or comments  
0 / 255

**SAVE TO PLAN** CANCEL

## Adding a care type

Assessment Delegates can add another care type for delegate decision for the client, if required.

1. At the bottom of the client's Decisions tab of the Support Plan and Services page, select **ADD A CARE TYPE FOR DELEGATE DECISION**.

Master Bart SAMPSON  
Male, 81 years old, 1 March 1944, AC01907385  
742 EVERGREEN TERRACE SPRINGFIELD, VIC, 3544

Primary contact: Bart Sampson (self)  
No support relationships recorded

### Support plan and services

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

#### IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment  
IAT Outcome: SaH Classification 5  
Recommended classification: SaH Classification 5 Agreed CHANGE  
Specified needs - Contenance Products  
HM Medium  
Override reason: Other Aged Care Programs  
Override reason description: Needs to be overridden to propose services.

#### Recommended care requiring delegate decision

- Recommend that the client receive Home support
- Recommend that the client receive Assistive technology
- Recommend that the client receive Home modifications

**ADD A CARE TYPE FOR DELEGATE DECISION** | RECOMMEND AN ASSISTIVE TECHNOLOGY

SAVE AND DELEGATE | RETURN TO ASSESSOR | RETURN TO CLIENT

2. In the pop-up box, select the care type that applies from the drop-down box. You will need to select the priority for the care type.

Please note that there are historical care types in this section, which should only be used in prescribed situations.

### Add care type for delegate decision

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

Which care type applies? \*  
Residential Permanent

Shared room + ensuite  
 Shared room + no bathroom or ensuite  
 Shared room + shared bathroom  
 Single room + ensuite  
 Single room + no bathroom or ensuite  
 Single room + shared bathroom

If time-limited, when does the approval stop (optional):  
(e.g. dd/mm/yyyy)

What is the urgency of this care type? \*  
High

Is this emergency care?  
 Yes  No

Reason or comments  
0 / 255

SAVE TO PLAN | CANCEL

- The care type will be added to the **Recommended care requiring delegate decision** list with a decision of **Agreed**.

Recommended care requiring delegate decision

<p>Residential Permanent • Single room + ensuite</p> <p>Urgency for this care type High (?)</p> <p>● Agreed</p> <p>CHANGE</p>	<p>Recommend that the client receive <b>Home modifications</b></p> <p>Recommend that the client receive <b>Assistive technology</b></p>
---	---


## Recommending a Home Modification Service under Support at Home

! When considering adding/editing Home modifications care recommendations, refer to:

- *Support Plan* section of [My Aged Care – Integrated Assessment Tool \(IAT\) User Guide](#)
- *Approving AT and HM under Support at Home and Approving AT and HM under CHSP* sections under Chapter 8 of the [My Aged Care Assessment Manual](#)
- Delegate training.

As a delegate you can recommend a Home modification (HM) service when the assessment identifies that changes to the client's living environment are necessary to support their safety, independence, or ability to remain at home.

- From the Decisions tab, select the **RECOMMEND HOME MODIFICATIONS** button.

 **Support plan and services**

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

**IAT Outcome and Classifications**

Current assessment type: Comprehensive Assessment  
IAT Outcome: SaH Classification 3  
Recommended classification: SaH Classification 3 ● Agreed CHANGE

**Recommended care requiring delegate decision**

Recommend that the client receive  
**Home support**

ADD A CARE TYPE FOR DELEGATE DECISION | RECOMMEND AN ASSISTIVE TECHNOLOGY | **RECOMMEND HOME MODIFICATIONS**

RETURN TO ASSESSOR | RETURN TO CLIENT

2. The **ADD HOME MODIFICATIONS RECOMMENDATION** screen appears. Select the home modification tier (Low, Medium, or High) from the drop-down list.

The Service Type section will be pre-filled and greyed out.

Choose whether the client want to seek Home modifications services through the Support at Home program.

Then, select **SAVE TO PLAN**.

**Add Home modifications recommendation**

The client's preference for seeking Home modifications services determines whether they are active in the AT-HM Priority System.

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

Home modifications tier\*  
HM Medium

Service Type\*  
Home adjustments

Home modification products  
 Home modifications prescription and clinical support

The client's preference for seeking Home modifications services through the Support at Home program is:\*  
 Seeking services  Not seeking services

**SAVE TO PLAN** CANCEL

## Recommending an Assistive Technology Service under Support at Home

! When considering adding/editing Assistive technology care recommendations, refer to:

- *Support Plan* section of [My Aged Care – Integrated Assessment Tool \(IAT\) User Guide](#)
- *Approving AT and HM under Support at Home* and *Approving AT and HM under CHSP* sections under Chapter 8 of the [My Aged Care Assessment Manual](#)
- Delegate training.

As an assessment delegate, you can recommend an Assistive technology service when the client's assessment indicates a need for equipment or devices that support daily living, safety, or independence to ensure the right equipment is provided to enhance the client's ability to live safely and independently at home.

Please note that Assistance dogs are classified under the Ongoing classification type of assistive technology.

It is known as 'Specified Needs – Assistance Dogs'.

1. From the Decisions tab, select the **RECOMMEND AN ASSISTIVE TECHNOLOGY** button.

**Support plan and services**

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

### IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment  
IAT Outcome: SaH Classification 2  
Recommended classification: SaH Restorative Care Pathway  **AGREE**

Override reason: Has restorative care goals  
Override reason description: RCP needed

### Recommended care requiring delegate decision

Recommend that the client receive

2. The **Add Assistive technology recommendation** screen appears.

Select the classification type from the drop down list.

If the classification type is Short-term, select the technology tier from the drop-down list. If it is Ongoing, assistance dogs is available under the Specified Needs section.

Choose whether the client want to seek Assistive technology services through the Support at Home program. Then, select **SAVE TO PLAN**.

*Assistive Technology Short Term example*

## Add Assistive technology recommendation

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

Classification type \*  
Short-term

Assistive technology tier \*  
AT Medium

Service Type \*  
Equipment and products

- Assistive technology prescription and clinical support
- Communication and information management products
- Domestic life products
- Managing body functions
- Mobility products
- Self-care products

The client's preference for seeking Assistive technology services through the Support at Home program is: \*

Seeking services  Not seeking services

# Add Assistive technology recommendation

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

Classification type \*

Ongoing

Specified needs \*

Specified needs - Assistance Dogs

Service Type \*

Equipment and products

- Assistive technology prescription and clinical support
- Communication and information management products
- Domestic life products
- Managing body functions
- Mobility products
- Self-care products

The client's preference for seeking Assistive technology services through the Support at Home program is:\*

Seeking services  Not seeking services

SAVE TO PLAN

CANCEL

- The recommendation will be displayed within the Decisions tab under **Recommended care requiring delegate decision** section. Expand the item to view the details. Select **AGREE** or **DISAGREE**. You can also edit the recommendation using the **Edit** (Pencil) icon as shown in the example below.

Recommended care requiring delegate decision

Home Care Package Level 2

The Home Care Packages (HCP) program is now the Support at Home program. On 1 July 2025, the HCP Program transitioned to the Support at Home program. [Learn more](#)

Client's preference for home care services: Seeking services

CHANGE

Agreed

CHANGE

Recommend that the client receive Home support

ADD A CARE TYPE FOR DELEGATE DECISION RECOMMEND AN ASSISTIVE TECHNOLOGY RECOMMEND A HOME MODIFICATION

RETURN TO ASSESSOR RETURN TO CLIENT

Recommend that the client receive Assistive technology

This recommendation requires a delegate decision

Assistive Technology Tier: AT Medium

Classification type: Short-term

Assistive technology services:

AGREE DISAGREE

## Recommending a second Restorative Care Pathway unit

! The same delegate cannot approve a client's Restorative Care Pathway (and associated AT-HM recommendations) **and** their support plan review, unless the delegate can confirm that there is not another delegate available to provide the approval/s.

Clinical Delegates can add a second unit of Restorative Care Pathway (RCP) during the Decision process during a Support Plan Review where a current Restorative Care episode is in effect. There are certain number of places available during the financial quarter for RCP units. Assessors and delegates should monitor departmental communications regarding RCP unit availability, particularly where a second unit is being considered.

! Delegates must not add a second unit of Restorative Care where a participant has not commenced their first episode of Restorative Care.

1. Go to the Delegate Decisions Tile from the assessor portal home page.
2. Select the client to add the second unit. This client must already have RCP approved and active.
3. Go to the client's support plan, then the Decision tab, then the IAT Outcome and Classification section.
4. Select **ADD SECOND UNIT OF RESTORATIVE CARE PATHWAY**.
5. The 'Add second unit of Restorative Care Pathway' pop up appears. Read the confirmation text, then select **ADD SECOND UNIT**.

The screenshot shows the 'Support plan and services' interface. The 'Decisions' tab is active. Under 'IAT Outcome and Classifications', there is a table with columns for 'Current assessment type', 'Comprehensive Assessment', 'Existing classification', and 'Sah Restorative Care Pathway'. Below this, there is a button labeled 'ADD SECOND UNIT OF RESTORATIVE CARE PATHWAY'. A pop-up window titled 'Add second unit of Restorative Care Pathway' is overlaid on the screen. The pop-up contains the text: 'The additional funding will be added to the client's existing Sah Restorative Care Pathway episode. The client can utilise this additional funding and any of their remaining funding until the end of their Restorative Care Pathway episode'. At the bottom of the pop-up, there are two buttons: 'ADD SECOND UNIT' (highlighted with a red box) and 'CANCEL'.

- The second unit now displays under the client's Current Care Approvals.  
The Delegate's decision appears under the Delegate's Decisions and Comments section.

## Support plan and services

Identified needs

Goals & recommendations

Decisions

Manage services & referrals

Associated People

IAT Outcome and Classifications

Current assessment type:	Home Support Assessment
IAT Outcome:	CHSP
Recommended classification:	SaH Restorative Care Pathway (Second Unit)

### Current care approvals

Recommended that the client receive

18 August 2025

### Support at Home

Classification or pathway:
SaH Restorative Care Pathway (Second Unit)

Classification type: Short-term

Priority category: Medium

Client's preference for Home support services: Seeking services

Home support services:

**Home maintenance and repairs:** Gardening, Assistance with home maintenance and repairs, Expenses for home maintenance and repairs

**Personal care:** Assistance with self-care and activities of daily living, Assistance with the self-administration of medication, Continence management (non-clinical)

**Transport:** Direct transport, Indirect transport

### Delegate decisions and comments

Assessment: Submitted on 18 August 2025

#### Decisions

Recommended that the client receive

18 August 2025

### Support at Home

Classification or pathway:
SaH Restorative Care Pathway (Second Unit)

Classification type: Short-term

Urgency for this care type: Medium

Client's preference for Home support services: Seeking services

Home support services:

**Home maintenance and repairs:** Gardening, Assistance with home maintenance and repairs, Expenses for home maintenance and repairs

**Personal care:** Assistance with self-care and activities of daily living, Assistance with the self-administration of medication, Continence management (non-clinical)

**Transport:** Direct transport, Indirect transport

Approval start: 18 August 2025

Agreed

## Changing a decision

1. If you need to change your decision from Agreed to Disagreed, or Disagreed to Agreed, you can select the **CHANGE** button.

Support plan and services PRINT COPY OF SUPPORT PLAN

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

### IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment  
IAT Outcome: SaH Classification 5  
Recommended classification: SaH Classification 5  Agreed  Disagreed **CHANGE**  
Specified needs - Continence Products  
HM Medium  
Override reason: Other Aged Care Program/s  
Override reason description: Needs to be overridden to propose services.

### Recommended care requiring delegate decision

Recommend that the client receive Home support

Recommend that the client receive Home modifications

Recommend that the client receive Assistive technology

Specified Needs: Specified needs - Continence Products  
Classification type: Ongoing  
Assistive technology services: Equipment and products: Assistive technology prescription and clinical support, Communication and information management products, Domestic life products, Managing body functions, Mobility products, Self-care products

Disagreed **CHANGE**

ADD A CARE TYPE FOR DELEGATE DECISION | RECOMMEND AN ASSISTIVE TECHNOLOGY

RETURN TO ASSESSOR | RETURN TO CLIENT

2. You will be able to add approval cease dates and comments where appropriate in the pop-up.

## Change decision

You are about to change the recommendation from agreed to disagreed for Bart SAMPSON for Residential Permanent

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

Comments or reason for disagreement \*  
Maximum 255 characters

**CHANGE** CANCEL

3. If you are changing the decision from **Agreed** to **Disagreed**, you will need to provide a reason for the change.  
Please note, this option will only be available prior to saving and completing the approval process.
4. A confirmation message will display.

Recommendation successfully updated.


## Editing a recommended classification

1. Go to the **Delegate Decisions** tile, and select the client's card or listing as per the process in [Viewing Decisions information](#).
2. Select on the pencil (Edit) icon next to the current recommended classification.

### IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment

IAT Outcome: CHSP

Recommended classification: SaH Classification 4 

Override reason: Higher level service needs

Override reason description: Description goes here

3. The **Edit Recommended Classification** pop up appears.

**!** An ongoing Support at Home 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). Assessors must **not** undertake this action and delegates must not approve assessments where this occurs, or override and select a lower or higher classification.

Select the new recommended classification, along with the override reason and description. Pay attention to any warning messages that may appear. Complete any other mandatory fields that appear, for example the client's preference for seeking Home support services.

Finally, select **SAVE TO PLAN**.

### Edit recommended classification

**!** Please contact the assessor before making any changes to the classification. Some recommendations may be removed as a result of this change. If you want to recommend a Restorative Care Pathway, End-of-Life Pathway or CHSP this will require the assessment to be returned to the assessor to add these services.

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

IAT outcome: CHSP


Recommended Classification: SaH Classification 4

Classification type: Ongoing

New recommended classification \*

To override the result, please specify the reason for the override and describe it for the delegate.

Override reason \*

Override reason description: \* 

0 / 150

- For Support at Home classifications, the **Edit Home Support Services** Screen displays. A truncated version of this page is shown below.

The default services for your edited classification appear on this page. Confirm or change the service, frequency and intensity details. Then, select **SAVE TO PLAN** at the bottom of the page.

## Edit Home Support Services

All fields marked with an asterisk ( \* ) must be completed before submission

Recommended that the client receive: SaH Classification 4  
Classification Type: Ongoing

Please select services within each service type\*

### Allied health and therapy

Service	Frequency	Intensity
<input type="checkbox"/> Aboriginal or Torres Strait Islander Health Practitioner assistance	_____	_____ ▾
<input type="checkbox"/> Aboriginal or Torres Strait Islander Health Worker assistance	_____	_____ ▾
<input type="checkbox"/> Allied health assistance	_____	_____ ▾

- The screen under the decisions tab will show the updated **Recommended classification** under **IAT Outcome and Classifications**. It can take up to 60 seconds for the update to take effect.

Support plan and services

GO TO THE ASSESSMENT
FLAG AS END-OF-LIFE
PRINT COPY OF SUPPORT PLAN

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

IAT Outcome and Classifications
↻

Current assessment type: Comprehensive Assessment

IAT Outcome: SaH Classification 2

Recommended classification: SaH Classification 4 ↻

Override reason: Higher level service needs

Override reason description: Override description goes here

- For **Residential Permanent recommendations**, a Clinical Assessment Delegate can make corrections to their decisions within 43 days. During the correction you can:

- add a residential permanent recommendation
- remove a residential permanent recommendation
- update urgency
- update approval expiry date
- update emergency needs
- update Delegate date (approval start date).

## Finalising your decision

1. Once the decision has been made, select **SAVE AND DELEGATE**.

The screenshot shows the 'Support plan and services' interface. At the top, there are tabs for 'Identified needs', 'Goals & recommendations', 'Decisions', 'Manage services & referrals', and 'Associated People'. The 'Decisions' tab is active. Below the tabs, there is a section titled 'IAT Outcome and Classifications' with the following details: Current assessment type: Comprehensive Assessment; IAT Outcome: SaH Classification 5; Recommended classification: SaH Classification 5 (Agreed); Specified needs - Continence Products; HM Medium; Override reason: Other Aged Care Program/s; Override reason description: Needs to be overridden to propose services. Below this is a section titled 'Recommended care requiring delegate decision' with three items: Residential Permanent (Single room + ensuite, High urgency, Agreed), Home support, and Assisted technology. At the bottom, there are buttons for 'ADD A CARE TYPE FOR DELEGATE DECISION', 'RECOMMEND AN ASSISTIVE TECHNOLOGY', 'SAVE AND DELEGATE' (highlighted in red), 'RETURN TO ASSESSOR', and 'RETURN TO CLIENT'.

2. A pop-up will display, confirming the care types that were agreed and not agreed. If you need to make any changes to your decision, select **CANCEL**. Ensure the date of the delegation is correct. For certain types of care, you can expand to see more information by using the expander button.

If you are satisfied with the decision and the date, select **SAVE DECISION**.

The screenshot shows a 'Save decision and delegate' pop-up window. It contains the following information: 'All fields marked with an asterisk (\*) are required.'; 'You are about to save the delegate decision under the Aged Care Act 2024 for Bart Sampson.'; 'The following care was agreed: Residential Permanent (High), Home Support Ongoing - SaH Classification 5, Assisted Technology Ongoing - Specified needs - Continence Products, Home Modifications Short-term - HM Medium.'; A list of care types with their recommended frequencies: Flexible respite (3 days per week), Domestic assistance (General house cleaning: 1 time(s) per hour, Laundry services: 1 days per month), Home maintenance and repairs (Gardening: 1 days per month, Expenses for home maintenance and repairs: 2 days per week), Meals (Meal delivery: 1 days per month, Meal preparation: 1 time(s) per day), Transport (Direct transport: 1 days per month, Indirect transport), Care management: Home support care management, Personal care (Assistance with self-care and activities of daily living: 1 days per week, Assistance with self-administration of medications: 3 days per month, Continence management (non-clinical): 2 days per month), Nursing care (Nursing assistant clinical care: 1 days per month, Enrolled nurse clinical care: 2 days per week, Nursing care consumables: 2 days per month, Registered nurse clinical care: 2 days per week), Social support and community engagement (Individual social support, Accompanied activities, Cultural support, Digital education and support, Assistance to maintain personal affairs, Expenses to maintain personal affairs), Allied health and therapy (Social work: 2 time(s) per year, Allied health assistance: 2 days per month, Occupational therapy: 2 days per week).; A 'Delegation date' field with the value '08/05/2025' (highlighted in red); and 'SAVE DECISION' and 'CANCEL' buttons at the bottom.

! If the approval was actioned off-system earlier than the day that the delegation is completed via the portal, you can set the date of delegation to the earlier date as reflected on the Approval Form.

It is available for download from the **Reports and Documents** tile of the assessor portal. This form is evidence that you made the approval decisions prior to the date you are making the entry on the system.

You must attach the Approval Form to the **Attachments** tab.

Save decision and delegate

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

You are about to save the delegate decision under the Aged Care Act 2024 for Bart Sampson.

The following care was agreed:

- Residential Permanent (High)
- Home Support Ongoing - SaH Classification 5
- Assistive Technology Ongoing - Specified needs - Continence Products
- Home Modifications Short-term - HM Medium

Delegation date \*  
07/05/2025

Delegation time  
(e.g. hh:mm AM/PM) 12:15 PM

I have made a decision for this client utilising other means before today

SAVE DECISION CANCEL

3. A confirmation message will display stating that the approvals have been submitted to Services Australia to process, and that the decision has been recorded and sent to the clinical assessor to finalise the client's support plan and match and refer for service.



## Non-Clinical Delegate workflow process

Non-clinical Assessment Delegates are delegated the authority under the Act to approve entry-level services arising from a home support assessment.

This means they can only approve access to the Commonwealth Home Support Program (CHSP), Assistive technology (AT) and/or Home modifications (HM) under CHSP (*not* under the AT-HM scheme).

If any approvals other than those listed above are required, the assessor must convert the assessment to a comprehensive assessment. Once an assessment is converted to a comprehensive assessment, the approval will flow to a Clinical Assessment Delegate. Clinical Assessment Delegate approval is required for all other approvals as outlined in detail in the next section.

### Agreeing with recommendations

1. To agree with the assessor's recommendations, select **AGREE** below the recommended service.

Mr William WILSON  
Male, 76 years old, 1 January 1950, AC61590477  
84 LEWIS LUXTON AVENUE GORDON, ACT, 2906

Primary contact: William Wilson (self) - 0412 123 123  
No support relationships recorded

#### IAT Outcome and Classifications

Current assessment type: Home Support Assessment  
IAT Outcome: CHSP  
Recommended classification: CHSP Agreed

#### Recommended care requiring delegate decision

Recommended that the client receive **Meals**  
• Meal delivery  
• Meal preparation  
**This recommendation is awaiting delegate decision**  
Priority: Low

Recommended that the client receive **Transport**  
• Direct transport  
**This recommendation is awaiting delegate decision**  
Priority: Low

Recommended that the client receive **Expand Domestic assistance instance**

2. You will be asked to confirm that you agree with the recommendation in a pop-up box. Select **AGREE**.

### Agree with recommendation

You are about to agree with the recommendation for William WILSON for Meals

- Meal delivery
- Meal preparation

3. A confirmation message will display and the status of the recommendation will display as **Agreed**.

Recommended that the client receive

### Meals

- Meal delivery
- Meal preparation

Priority Low

**Agreed**

CHANGE

### ! Reissuing CHSP referrals – Urgent services

All clients who have accessed urgent services are required to complete an assessment, *and* new referrals must be generated for any approved ongoing CHSP services.

- CHSP providers will continue to deliver urgent services until an assessment is completed.
- When ongoing CHSP services are approved, the *urgent service referral should end*.
- New CHSP referrals are required for the provider to continue delivering services on an ongoing basis.
- Where a delegate does not approve the urgent service:
  - If the service has not commenced, the direct-to-provider referral will be recalled.
  - If the service has commenced, the provider will be notified that the urgent service is not approved, and should cease urgent service provision.

### Disagreeing with recommendations

Disagreeing with a recommendation will result in a non-approval of that recommended service.

If a recommendation is mistakenly added by the assessor, the delegate can disagree with the assessor's recommendation, and/or add their own recommendation.

Recommended that the client receive

### Domestic assistance

- General house cleaning
- Laundry services
- Shopping assistance

Priority Low

Delegate comment Not required.

**Disagreed**

CHANGE

Follow the steps below to disagree with a recommendation:

1. Select the expander button to show the recommended service for approval.

Recommended care requiring delegate decision

- Recommended that the client receive **Meals**
- Recommended that the client receive **Domestic assistance**
- Recommended that the client receive **Transport**

ADD A SERVICE RECOMMENDATION    ADD NO CARE APPROVAL

RETURN TO ASSESSOR    RETURN TO CLIENT

2. Select **DISAGREE** below the recommended service. You will need to repeat this process for each service that you disagree with.

Support plan and services

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

IAT Outcome and Classifications

Current assessment type: Home Support Assessment  
IAT Outcome: CHSP  
Recommended classification: CHSP **Agreed** CHANGE

Recommended care requiring delegate decision

- Recommended that the client receive **Meals**
- Recommended that the client receive **Domestic assistance**
- Recommended that the client receive **Transport**
  - Direct transport
  - This recommendation is awaiting delegate decision**
  - Priority: Low

ADD A SERVICE RECOMMENDATION    ADD NO CARE APPROVAL

RETURN TO ASSESSOR    RETURN TO CLIENT

3. You will need to provide a comment about your reason for disagreeing with the recommendation, then select **DISAGREE**.

Disagree with recommendation

You are about to disagree with the recommendation for William WILSON for  
Transport

- Direct transport

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

Comments or reason for disagreement \*

Recommendation was incorrectly applied by assessor.

DISAGREE    CANCEL

4. A confirmation message will display, and the status of the recommendation will change to **Disagreed**.

The screenshot shows a web interface for managing care recommendations. On the left, there are two recommended services: 'Meals' and 'Domestic assistance'. On the right, a detailed view for 'Transport' is shown, with a status of 'Disagreed' highlighted in a red box. Below the status is a 'CHANGE' button. At the bottom of the interface, there are buttons for 'ADD A SERVICE RECOMMENDATION', 'ADD NO CARE APPROVAL', 'SAVE AND DELEGATE', 'RETURN TO ASSESSOR', and 'RETURN TO CLIENT'. A green confirmation message at the bottom reads 'Recommendation successfully updated.'

5. If you need to change your decision, you can select **CHANGE**.

This option will only be available prior to saving and completing the approval process by selecting **Save and Delegate**.



Refer to the [Changing a Decision](#) section for more details.

The 'Change decision' dialog box is displayed, showing the current recommendation for 'Transport' (Direct transport) for William WILSON. It prompts the user to provide 'Comments or reason for disagreement' in a text area, which is highlighted with a red box. A note indicates a maximum of 255 characters. At the bottom right, there are 'CHANGE' and 'CANCEL' buttons, with the 'CHANGE' button highlighted by a red box.

## Editing a recommendation

1. To edit a service recommended by an assessor, select the **Edit** icon to the right of the recommendation.

### Recommended care requiring delegate decision

Recommended that the client receive  

**Meals**

- Meal delivery
- Meal preparation

Priority Low

**Agreed**

[CHANGE](#)

2. The **Edit a care type** pop up will be displayed, and you will be able to make any changes required. Select **SAVE TO PLAN** to save the change.

### Edit service recommendation

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

Service Type: \*  
Meals

Meal delivery  Meal preparation

Priority and dates

Priority \*  
Low

Recommended service frequency ? Recommended service intensity ?

Recommend a start date  
 Yes  No

Recommend a review date  
 Yes  No

Recommend an end date  
 Yes  No

Responsibility to action  
 Assessor  Client  Other

Comments:  
0 / 100

[SAVE TO PLAN](#) [CANCEL](#)

## Changing a decision

1. If you need to change your decision for a service from Agreed to Disagreed, or Disagreed to Agreed, you can select the **CHANGE** button.

The screenshot shows the 'IAT Outcome and Classifications' section. It displays the current assessment type as 'Home Support Assessment' and the IAT Outcome as 'CHSP'. The recommended classification is 'CHSP' with a status of 'Agreed'. A 'CHANGE' button is visible next to the classification. Below this, there is a section for 'Recommended care requiring delegate decision' with three items: 'Meals', 'Domestic assistance', and 'Transport'. The 'Transport' item is expanded, showing 'Direct transport' with a 'Priority' of 'Low' and a 'Delegate comment' stating 'Recommendation was incorrectly applied by assessor.'. The decision for 'Transport' is currently 'Disagreed', and a 'CHANGE' button is highlighted with an orange box. At the bottom, there are buttons for 'ADD A SERVICE RECOMMENDATION', 'ADD NO CARE APPROVAL', 'SAVE AND DELEGATE', 'RETURN TO ASSESSOR', and 'RETURN TO CLIENT'.

2. You will be able to add approval cease dates and comments where appropriate in the pop-up.

The screenshot shows a 'Change decision' pop-up window. The title is 'Change decision'. The content states: 'You are about to change the recommendation from agreed to **disagreed** for William WILSON for Transport'. It lists 'Direct transport' as the service. A note says 'All fields marked with an asterisk (\*) are required.' Below this is a text area for 'Comments or reason for disagreement \*' with a sub-note 'Maximum 255 characters'. At the bottom right, there are two buttons: 'CHANGE' and 'CANCEL', with the 'CHANGE' button highlighted by an orange box.

3. If you are changing the decision from **Agreed** to **Disagreed**, you will need to provide a reason for the change.  
Please note, this option will only be available prior to saving and completing the approval process.
4. A confirmation message will display.

The screenshot shows a green confirmation message with a white checkmark icon on the left and the text 'Recommendation successfully updated.' on the right. There is a small 'X' icon in the top right corner of the message box.

## Adding CHSP services by a Non-Clinical Assessment Delegate

Non-Clinical Assessment Delegates can add services for the client, if required.

### 1. Select **ADD A SERVICE RECOMMENDATION**.

Mr William WILSON  
Male, 76 years old, 1 January 1950, AC61590477  
84 LEWIS LUXTON AVENUE, GORDON, ACT, 2906

Primary contact: William Wilson (self) - 0412 123 123  
No support relationships recorded

Support plan and services PRINT COPY OF SUPPORT PLAN

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

**IAT Outcome and Classifications**

Current assessment type: Home Support Assessment  
IAT Outcome: CHSP  
Recommended classification: CHSP Agreed CHANGE

**Recommended care requiring delegate decision**

- Recommended that the client receive **Meals**
- Recommended that the client receive **Transport**
- Recommended that the client receive **Domestic assistance**

**ADD A SERVICE RECOMMENDATION** ADD NO CARE APPROVAL

**SAVE AND DELEGATE** RETURN TO ASSESSOR RETURN TO CLIENT

### 2. In the pop-up box, select the service that applies from the drop-down box.

**Add service recommendation**

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

Service Type: \*  
Transport

Direct transport  Indirect transport

**Priority and dates**

Priority: \*  
Low

Recommended service frequency ? Recommended service intensity ?

**Recommend a start date**  
 Yes  No

**Recommend a review date**  
 Yes  No

**Recommend an end date**  
 Yes  No

**Responsibility to action**  
 Assessor  Client  Other

Comments:  
0 / 100

**SAVE TO PLAN** CANCEL

3. The services will be added to the **Support Plan** with a default decision of **Agreed**.

Recommended that the client receive  
**Transport**

- Direct transport

Priority Low

**Agreed**

## Finalising your decision

1. Once the decision has been made, select **SAVE AND DELEGATE**.

Support plan and services PRINT COPY OF SUPPORT PLAN

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

**IAT Outcome and Classifications**

Current assessment type: Home Support Assessment  
IAT Outcome: CHSP  
Recommended classification: CHSP  **Agreed**

**Recommended care requiring delegate decision**

- Recommended that the client receive **Meals**
- Recommended that the client receive **Transport**
- Recommended that the client receive **Domestic assistance**

A pop-up will display, confirming the services that were agreed and not agreed. If you need to make any changes to your decision, select **CANCEL**. Ensure the date of the delegation is correct. For certain types of services, you can expand to see more information by using the expander button. If you are satisfied with the decision and the date, select **SAVE DECISION**.

**Save decision and delegate**

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

You are about to save the delegate decision under the *Aged Care Act 2024* for William Wilson.

The following care was **agreed**:

- Meals
  - Meal delivery, Meal preparation
- Transport
  - Direct transport

The following care was **not agreed**:

- Domestic assistance
  - Shopping assistance, General house cleaning, Laundry services

Delegation date \*  
10/06/2026

! If the approval was actioned off-system earlier than the day that the delegation is completed via the portal, you can set the date of delegation to the earlier date as reflected on the Approval Form.

It is available for download from the **Reports and Documents** tile of the assessor portal. This form is evidence that you made the approval decisions prior to the date you are making the entry on the system.

You must attach the Approval Form to the **Attachments** tab.

Save decision and delegate

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

You are about to save the delegate decision under the Aged Care Act 2024 for Bart Sampson.

The following care was agreed:

- Residential Permanent (High)
- Home Support Ongoing - SaH Classification 5
- Assistive Technology Ongoing - Specified needs - Continence Products
- Home Modifications Short-term - HM Medium

Delegation date\*  
07/05/2025

Delegation time  
(e.g. hh:mm AM/PM) 12:15 PM

I have made a decision for this client utilising other means before today

SAVE DECISION CANCEL

## Correspondence Notifications

If you have approved a Support at Home Classification or a Residential Care classification, you can request to receive notifications of any Support at Home or Residential Care correspondence received by that client from the department.

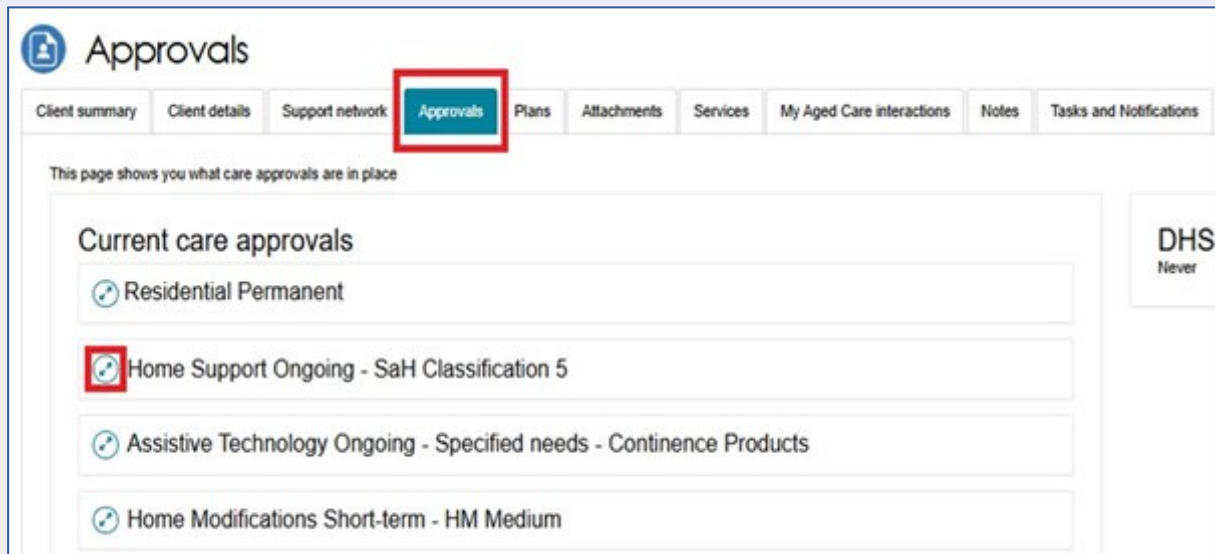
For Support at Home, this may be required in circumstances where the client is considered to be a vulnerable client that may require assistance from a clinical assessor to link to Home Support services.

Examples of Residential Care correspondence include:

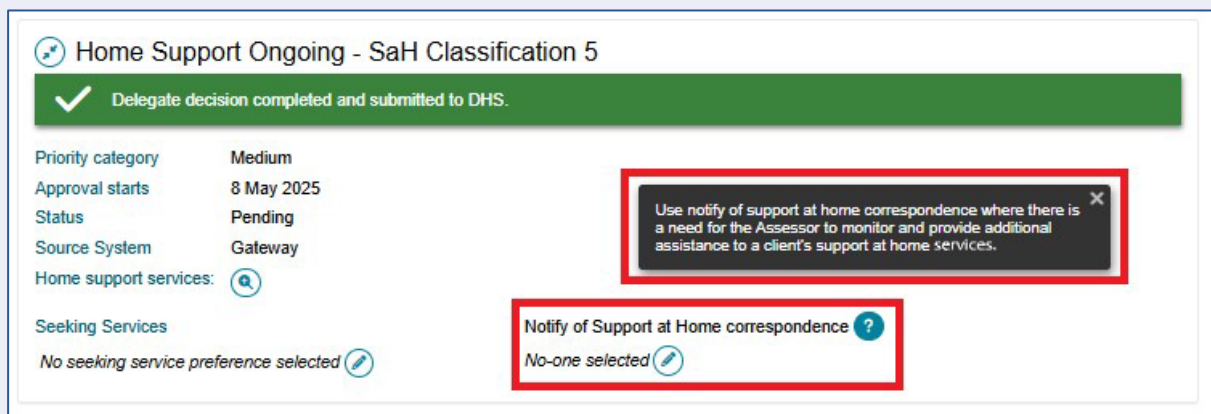
- permanent residential care is allocated
- approval about to expire.

For general information about notifications and tasks in the assessor portal, please refer to [My Aged Care – Assessor Portal User Guide 9 – Tasks and notifications](#).

1. To receive notifications, go to the **Approvals** tab in the client record under the Current care approvals section by selecting the **expand** button next to the Support at Home or Residential Care classification name. You can select one person from an outlet to receive this notification.



2. The below screenshot shows the expanded view – Select the **edit** button underneath **Notify of [Program] Correspondence** to specify the staff member and refer to the help text for guidance.



3. Complete the information required and choose a Recipient from the list of staff members in the outlet. Select **SAVE** to return.



4. You should be able to see your nominated Recipient of the notification on the **Approvals** tab.

**Current care approvals**

- Residential Permanent
- Home Support Ongoing - SaH Classification 5
  - Delegate decision completed and submitted to DHS.
  - Priority category: Medium
  - Approval starts: 8 May 2025
  - Status: Pending
  - Source System: Gateway
  - Home support services:
  - Seeking Services: No seeking service preference selected
  - Notify of Support at Home correspondence
  - Felipe Sierra
- Assistive Technology Ongoing - Specified needs - Continence Products
- Home Modifications Short-term - HM Medium

5. The delegate will be able to view the client's record under the **Delegate decision complete** section of their **Current assessments** tab.

The assessor will then need to match and refer for services and finalise the support plan.

**Current assessments** Currently viewing Sunrise Assessments - ACA - VIC 3

**Delegate decision complete**

- Aziz HANNA
  - RESERVOIR, VIC, 3073
  - Aged care user ID: AC20947669
  - Date accepted: 5 May 2025
  - Comprehensive
  - Delegate Decision Complete **High**
- Bart SAMPSON
  - SPRINGFIELD, VIC, 3544
  - Aged care user ID: AC01907385
  - Date accepted: 6 May 2025
  - Comprehensive
  - Delegate Decision Complete **Low**

- The assessor will receive a notification in the **Task and notifications** page that the delegate has completed their decision, and they will be able to navigate to the client record and directly to match and refer for services from this page.

Home | Tasks and notifications

## Tasks and notifications

Tasks **Notifications** HCP Notifications

Filter by

Received	Category	Title/Description	Channel	Aged Care User ID	Client name	Select	Remove
8 May 2025	Referrals	<b>New Referral</b> You have a new referral from My Aged Care. Referral created at 08/05/2025 11:11 for Aged Care User Id: AC73545949 Outlet name Sunrise Assessments - ACA - VIC 3 Assessment Type Comprehensive Assessment Priority: High Activity Id: 2-159876389867 <b>Go to:</b> <a href="#">Incoming Referrals</a>		<a href="#">AC73545949</a>	MILNER Evelina	<input type="checkbox"/>	
8 May 2025	Delegate Decision	<b>Formal Delegate Decision</b> A formal Delegate Decision has been made on the approved care type under the Aged Care Act 2024. Details are as follows - Aged Care User Id: AC01907385 Delegate Name Felipe Sierra Date decision made 08/05/2025 09:41:44 AM Decision Status: Care Approved for Assessment Activity Id: 2-159875383991 <b>Go to:</b> <a href="#">Match and Refer</a>		<a href="#">AC01907385</a>	SAMPSON Bart	<input type="checkbox"/>	
6 May 2025	Referrals	<b>New Referral</b> You have a new referral from My Aged Care. Referral created at 06/05/2025 17:04 for Aged Care User Id: AC07973092 Outlet name Sunrise Assessments - ACA - VIC 3 Assessment Type Comprehensive Assessment Priority: High		<a href="#">AC07973092</a>	REA Jewell	<input type="checkbox"/>	

## Notice of Decision (approval or non-approval) letter and SaH Restorative Care Pathway (Second Unit) approval and non-approval letter

The assessment delegate can generate and upload the Notice of Decision (NoD) letter and SaH Restorative Care Pathway (second unit) approval letter, after the delegate decision is completed. This applies to both Approval letters and non-Approval letters.

To generate, print and upload approval or non-approval letters, navigate to the client's support plan, then the **Decisions** tab.

You will be able to generate and upload letters appropriate to the client's circumstances. The buttons on the Decisions tab and the options within the pop-up will reflect the available letter types.

You can also upload NoD letters via the Attachments tab.

If you have agreed to more than one care type recommendation for the client, you only need to generate, upload and print one approval letter to send to the client. The information about all agreed care types will appear on this letter.

A person assigned the Delegate Support role will also be able to print and upload these letters.

### Approval Letters

! For approval decisions, the Notice of Decision must contain the following: :

- the approved service groups (and service types and services, where applicable)
- the approved classification type for each service group
- the approved classification levels (which can indicate the level of funding)
- the approved priority category (where applicable)
- the reasons and evidence supporting the delegate's decision
- the older person's rights of review, should they wish to query or dispute the decision.

This is to ensure high quality and consistency in letters that clients receive.

1. Go to the Client's profile and select the **Plans** tab. In the Plans page select the **Support Plan** button.

The screenshot shows the 'Plans' tab selected in a client profile. The 'Plans' tab is highlighted with a red box. Below the tabs, the 'Current Episode' section displays 'Episode ID: 2-21UJRNO4' and '9 July 2025 - Present'. A 'SUPPORT PLAN' button is highlighted with a red box. The 'Assessment history' section shows two entries: 'Comprehensive Assessment 9 July 2025' and 'Screening 9 July 2025'.

2. The Support Plan and Services page appears. Select the **Decisions** tab. At the bottom of the page, you will be able to select **GENERATE APPROVAL LETTER**.

The screenshot shows the 'Support plan and services' interface. At the top, there are tabs for 'Identified needs', 'Goals & recommendations', 'Decisions' (highlighted with a red box), 'Manage services & referrals', 'Associated People', and 'Review'. Below the tabs, there are sections for 'IAT Outcome and Classifications' and 'Delegate decisions and comments'. The 'Decisions' section contains two entries: 'Support Plan Review: Submitted on 2 February 2026' and 'Assessment: Submitted on 2 February 2026'. Each entry has a 'Decisions' sub-section with a text box for recommendations and a 'Decision date' field. At the bottom of the page, there are three buttons: 'GENERATE APPROVAL LETTER' (highlighted with a red box), 'UPLOAD APPROVAL LETTER', and 'RETURN TO CLIENT'.

3. The Generate Approval Letter pop up appears. Ensure you are generating the letter for the correct client, then select **GENERATE APPROVAL LETTER**.

The screenshot shows a 'Generate approval letter' pop-up window. The title bar is teal with a close button. The main content area is white and displays the text 'You are generating the approval letter for Stacey SMITH'. At the bottom right, there are two buttons: 'GENERATE APPROVAL LETTER' (highlighted with a purple box) and 'CANCEL'.

The Approval for RCP 2<sup>nd</sup> unit of funding letter can be generated via the portal the same way as the NoD Approval and Non-approval letters are generated.

The below image shows the option to select to generate the approval letter, and/or the SaH Restorative Care Pathway (Second Unit) approval letter.

The screenshot shows a 'Generate approval letter' pop-up window. The title bar is teal with a close button. The main content area is white and displays the text 'You are generating the approval letter for <Client first name><CLIENT LAST NAME>'. Below this, there is a 'Generate:' section with two checkboxes: 'Approval letter' and 'SaH Restorative Care Pathway (Second Unit) approval letter'. At the bottom right, there are two buttons: 'GENERATE APPROVAL LETTER' and 'CANCEL'.

- If the Approval letter takes too long to generate, you will be re-directed to the **Reports** tab where you will be able to select **View** to open a copy of the letter. The NoD letters and Referral Code letters will be retained in **Recently Requested Reports** for seven days, after which they will be cleared from this screen. They can be regenerated per the original process.

Home | Reports and documents

## Reports and documents

Reports Forms Links

### My Reports

Name	Requested Date	Status
Bart Sampson Delegate Approval Letter Template 8 May 2025	8 May 2025	Ready - View

- When you have signed the letter, you can use the **UPLOAD APPROVAL LETTER** button in the **Decisions** tab of the support plan to upload the letter to the client's record. Alternatively you can upload it via the Attachments tab.

#### Decisions Tab

Support plan and services

REQUEST ASSESSMENT PRINT COPY OF SUPPORT PLAN

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

### IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment Existing classification: SaH Classification 4 (Pending allocation)  
IAT Outcome: SaH Classification 4 AT High (Pending allocation)

### Delegate decisions and comments

Support Plan Review: Submitted on 2 February 2026

Assessment: Submitted on 2 February 2026 Document was last saved: Just now

#### Decisions

Recommend that the client receive Home support

Recommend that the client receive Assistive technology

Decision date (Assessment)  
2 February 2026 11:53 AM (Australian Eastern Standard Time)

GENERATE APPROVAL LETTER **UPLOAD APPROVAL LETTER**

RETURN TO CLIENT

#### Attachments Tab

Morgan FREEMAN  
Male, 88 years old, 1 June 1937, AC36914539  
56 WHITE TRAIL ROAD BREMER BAY, WA, 6338

Primary contact: Morgan Freeman (self)  
No support relationships recorded

## Attachments

REFER THIS CLIENT FOR ASSESSMENT VIEW CLIENT REPORT

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

Residential Funding Classifications

### Attachments

**ADD AN ATTACHMENT**

Assessment Attachments Other Attachments Correspondence

No attachments found to be displayed.

6. The Upload approval letter, or the Add an Attachment pop up appears. Choose the approval letter file to upload.

NoD Letters are defaulted to the Rich Text Format (.rtf) when being generated. This format is not accepted when uploading. Approval letters must only be uploaded to the portal in PDF format. Word documents must not be uploaded as the formal approval letter. PDF ensures the document cannot be altered after finalisation.

Enter the name of the attachment. If you are attaching the letter, ensure the attachment type is **Approval letter sent to client**. Optionally provide a short description about the contents of the attachment. Finally, select **UPLOAD**.

#### UPLOAD APPROVAL LETTER EXAMPLE

Upload approval letter

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

You can upload files up to 5MB. The following file types are accepted: jpeg, jpg, .bmp, .png, .docx, .xlsx, .pdf, .txt

Approval letter to upload \*

CHOOSE FILE Morgan Fr... 2026.pdf

Name of the attachment: \*

Morgan Freeman Approval Letter

Please provide a short description about the contents of the attachment, e.g. assessment date and time

Details go here

UPLOAD CANCEL

#### ADD AN ATTACHMENT EXAMPLE

Add an attachment

Please note: Some attachments will be viewable by other people with authorised access to this client record. Please refer to your portal guide for details.

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

You can upload files up to 5 MB to this record. The following file types are accepted: .jpeg, .jpg, .bmp, .png, .docx, .xlsx, .pdf, .txt \*

CHOOSE FILE Morgan Fr... 2026.pdf

Name of the attachment: \*

Morgan Freeman Approval Letter

Type of attachment \*

Approval Letter Sent to Client

Please provide a short description about the contents of the attachment, e.g. assessment date and time

Description about approval letter

UPLOAD CANCEL

7. The uploaded letter will display in the Attachments tab.

The screenshot shows the 'Attachments' tab selected in the client profile for Morgan Freeman. The 'Attachments' section is highlighted with a red box, showing an attachment titled 'Approval Letter Sent to Client' dated 2 February 2026. The attachment description is 'Morgan Freeman Approval Letter\_260202191401 [pdf 300.71KB]' and 'Description about approval letter'. A 'HIDE FROM VIEW' button is visible next to the attachment name.

## Non-approval Letters

Delegates can only generate non-approval letters when the delegate decision contains 'No care approval' or 'No change to existing care approvals'.

1. Go to the Client's profile and select the **Plans** tab. In the Plans page select the **Support Plan** button.

The screenshot shows the 'Plans' tab selected in the client profile for Morgan Freeman. The 'Plans' tab is highlighted with a red box. Below the 'Current Episode' section, the 'SUPPORT PLAN' button is highlighted with a red box. The 'Assessment history' section shows two assessments: 'Comprehensive Assessment 9 July 2025' and 'Screening 9 July 2025'.

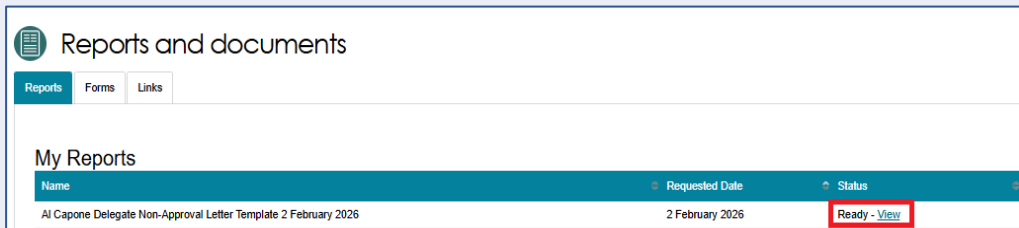
2. Navigate to the **Decisions** tab of the support plan. At the bottom of the page, you will be able to select **GENERATE NON-APPROVAL LETTER**.

The screenshot shows the 'Support plan and services' page for Morgan Freeman. The 'Decisions' tab is highlighted with a red box. The 'IAT Outcome and Classifications' section shows 'Current assessment type: Comprehensive Assessment' and 'IAT Outcome: SaH Classification 3'. The 'Delegate decisions and comments' section shows an assessment submitted on 2 February 2026. The 'Decisions' section shows a decision titled 'No Care Approval' with a priority of 'Low' and an approval start date of 2 February 2026. The decision is marked as 'Agreed'. The 'Decision date (Assessment)' is 2 February 2026 12:00 AM (Australian Eastern Standard Time). At the bottom, the 'GENERATE NON-APPROVAL LETTER' button is highlighted with a red box.

If the Non-Approval letter takes too long to generate, you will be re-directed to the **Reports** tab where you will be able to select **View** to open a copy of the letter.

Certain user generated documents, including NoD letters and Referral Code letters, will be retained in **Recently Requested Reports** for seven days, after which they will be cleared from this screen. They can be regenerated as per the original process.

When the 2<sup>nd</sup> concurrent unit of Restorative Care Pathway funding is not approved, the offline template needs to be used. The template is titled 'Letter template – Second concurrent unit of RCP funding' (or similar) in the Assessor Portal 'Reports and documents' under the Forms tab.

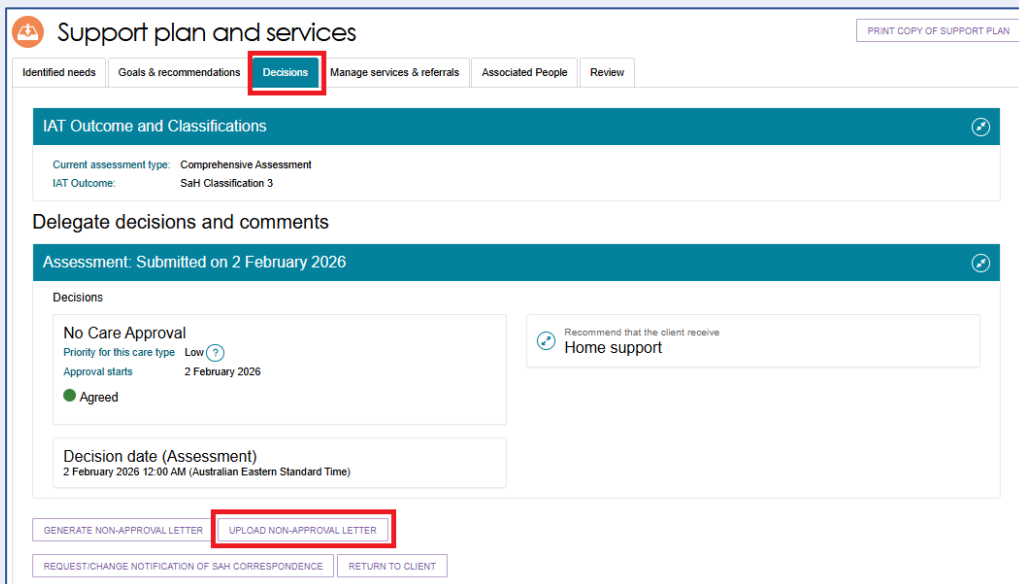


Name	Requested Date	Status
Al Capone Delegate Non-Approval Letter Template 2 February 2026	2 February 2026	Ready - View

- When you have signed the letter, you can use the **UPLOAD NON-APPROVAL LETTER** button in the **Decisions** tab of the support plan to upload the letter to the client's record.

Alternatively, you can upload this through the **Attachments** tab on the client record.

Decisions tab of the Support Plan



Support plan and services

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

IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment  
IAT Outcome: SaH Classification 3

Delegate decisions and comments

Assessment: Submitted on 2 February 2026

Decisions

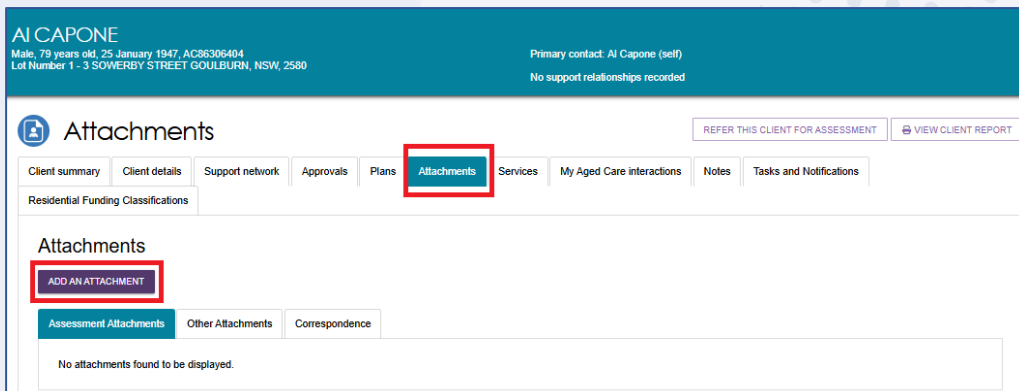
No Care Approval  
Priority for this care type: Low  
Approval starts: 2 February 2026  
Agreed

Recommend that the client receive Home support

Decision date (Assessment)  
2 February 2026 12:00 AM (Australian Eastern Standard Time)

GENERATE NON-APPROVAL LETTER | **UPLOAD NON-APPROVAL LETTER** | REQUEST CHANGE NOTIFICATION OF SAH CORRESPONDENCE | RETURN TO CLIENT

Attachments Tab of the Client Record



AI CAPONE  
Male, 79 years old, 25 January 1947, AC26305404  
Lot Number 1 - 3 SOWERBY STREET GOULBURN, NSW, 2580

Primary contact: Al Capone (self)  
No support relationships recorded

Attachments

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

Residential Funding Classifications

**ADD AN ATTACHMENT**

Assessment Attachments | Other Attachments | Correspondence

No attachments found to be displayed.

4. The Upload non-approval letter pop up, or the Add an attachment pop up appears. Choose the Non-approval letter file to upload or attach.

NoD Letters are defaulted to the Rich Text Format (.rtf) when being generated. This format is not accepted when uploading. Non approval letters must only be uploaded to the portal in PDF format. Word documents must not be uploaded as the formal non-approval letter. PDF ensures the document cannot be altered after finalisation.

Enter the name of the attachment.

If you are attaching the letter, ensure the attachment type is **Non-approval letter sent to client**. Optionally provide a short description about the contents of the attachment.

Finally, select **UPLOAD**.

Upload Non-approval letter pop up example

Upload non-approval letter

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

You can upload files up to 5MB. The following file types are accepted: .jpeg, .jpg, .bmp, .png, .docx, .xlsx, .pdf, .txt

Non-Approval letter to upload \*

CHOOSE FILE AI Capon...ry 2026.pdf

Name of the attachment: \*

AI Capone Non-approval letter

Please provide a short description about the contents of the attachment, e.g. assessment date and time

Details go here

UPLOAD CANCEL

Add an attachment example

Add an attachment

Please note: Some attachments will be viewable by other people with authorised access to this client record. Please refer to your portal guide for details.

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

You can upload files up to 5 MB to this record. The following file types are accepted: .jpeg, .jpg, .bmp, .png, .docx, .xlsx, .pdf, .txt \*

CHOOSE FILE AI Capon...ry 2026.pdf

Name of the attachment: \*

AI Capone Non-approval letter

Type of attachment \*

Non-Approval Letter to Client

Please provide a short description about the contents of the attachment, e.g. assessment date and time

Details go here

UPLOAD CANCEL

The uploaded non-approval letter will display in the Attachments tab.

AI CAPONE  
Male, 79 years old, 25 January 1947, AC85306404  
Lot Number 1 - 3 SOWERBY STREET GOULBURN, NSW, 2580  
Primary contact: AI Capone (self)  
No support relationships recorded

Attachments

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

Residential Funding Classifications

Attachments

ADD AN ATTACHMENT

Assessment Attachments Other Attachments Correspondence

Non-Approval Letter to Client 2 February 2026  
AI Capone Non-approval letter\_260202215603 [pdf 292.12KB] HIDE FROM VIEW  
Details go here

## Manage service and referrals

You must ensure the completion of the Notice of Decision for a Home Support Assessment before you continue to manage services and issue referrals.

Please refer to [Assessor Portal User Guide 8 - Referring for Services](#) for further information on this process.

## Requesting correction to care approval decision

A corrections process is available where you have made an error in recording a decision.

Correction requests can be submitted up to 42 days after initial delegation, where there are no active or commenced service referrals.

Follow these steps to request a correction to care approval decisions:

1. In the Delegate Decisions tab of the portal, navigate to the **Decision history** tab.  
Select the expand arrow on the client card to display a summary of the client's information in the pop-up.  
Select **REQUEST CHANGES TO CARE APPROVAL DECISION**.  
If you are using list view, this option will be available from the expanded client information section.

Card View

Gery GARDENER

Age 88 (1 July 1936) Referred from GRAZIER AGED CARE - ACA - ACT on 26 May 2025

**Recommended care:**

- Home Support Short-term - SaH Restorative Care Pathway
- Assistive Technology Short-term - AT Low

VIEW SUPPORT PLAN VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

**REQUEST CHANGES TO CARE APPROVAL DECISIONS**

List View

Last name	First name	Aged care user ID	Assessor full name	Delegate full name	Assessment status	Date submitted	Priority
YINDI	Thomas KK	AC16332744	GREEN Africa	GREEN Africa	Delegate Decision Complete	26/05/2025	High
AUTORAIUK	AUTOGenesisi	AC58367525	GREEN Africa	GREEN Africa	Finalised	26/05/2025	Medium
GARDENER	Gerry	AC97375885	GREEN Africa	FREE Prospect	Delegate Decision Complete	26/05/2025	Low

Age 88 (1 July 1936) Referred from GRAZIER AGED CARE - ACA - ACT on 26 May 2025

**Recommended care:**

- Home Support Short-term - Sah Restorative Care Pathway
- Assistive Technology Short-term - AT Low

VIEW SUPPORT PLAN VIEW FULL CLIENT RECORD VIEW CLIENT REPORT **REQUEST CHANGES TO CARE APPROVAL DECISIONS**

- Record a reason for the change and provide appropriate reasons for the request, then select **OK, START CHANGES**. Your reasons need to be consistent with the assessment information on the client record.

## Request changes to care approval decisions

All fields marked with an asterisk (\*) are required.  
You are about to request changes to the care approval decisions for Gerry Gardener.

Please provide a comment for these changes? \*

0 / 255

**OK, START CHANGES** CANCEL

- You will be redirected to the client's support plan and services page, where you will receive a confirmation message of your change request, and that the correction is in progress.

✓
You have successfully requested to begin making corrections to Care Approvals.
✕

i
Care approval correction in progress.
✕

- While on the same screen, you will be able to make edits to remove and/or add care types, including:
  - [making changes to the commencement date of the delegate decision](#)
  - [requesting the removal and addition of different care classification within a care type within the same correction request.](#)
- You can view the client's history of corrections by going to the Decisions History tab and then select **VIEW CORRECTIONS HISTORY**.

### Decision history

Decision pending: **Decision history**

Filter by

Last name	First name	Aged care user ID	Assessor full name	Delegate full name	Assessment status
DEANNA	Abigail	AC41040205	TEST Bruce	OMEGA Beta	ACAP Decision Complete (Support Plan Review)

Age 61 (27 January 1964) Referred from ACAT Outlet 13 on 6 December 2024

Decision on changes to care approvals on 26 November 2025

**Recommended care:**  
Transport

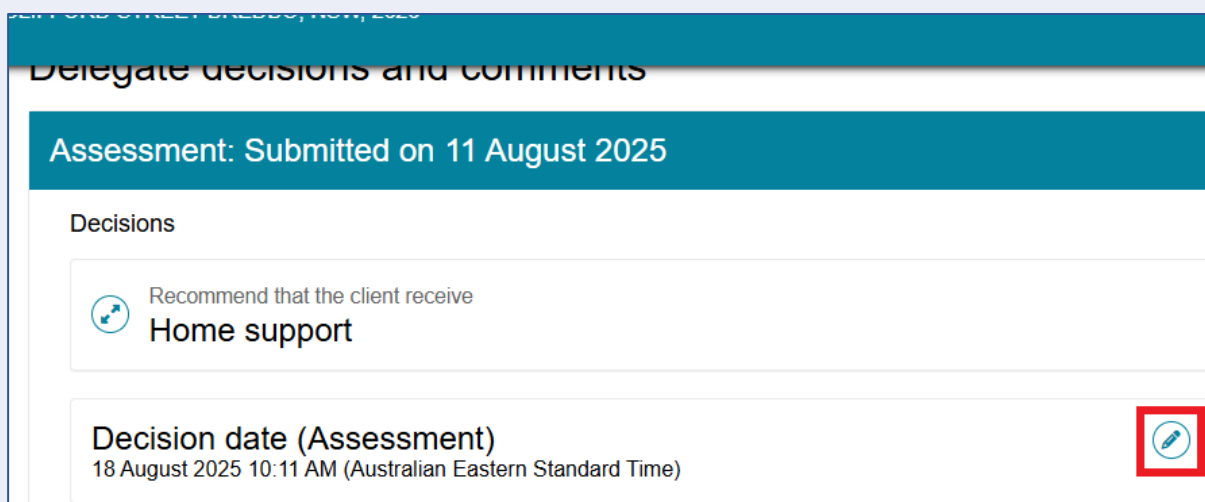
VIEW SUPPORT PLAN VIEW FULL CLIENT RECORD VIEW CLIENT REPORT **VIEW CORRECTIONS HISTORY**

## Making changes to the Decision Date of the delegate decision

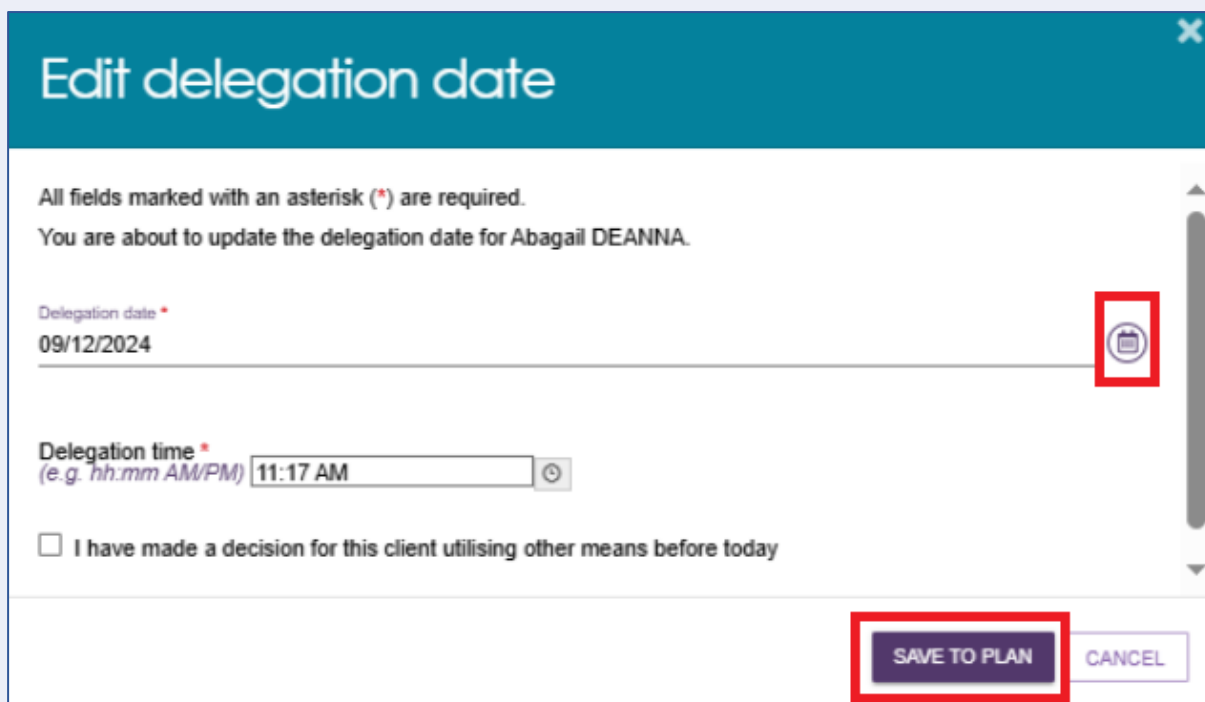
The Delegate can make changes to the Decision Date (commencement date) of the delegate decision. This applies to both Comprehensive assessments and Home support assessments, and all three decision periods (Assessment, Support Period, and Support Plan Review). However, changes to Residential Permanent, Residential Respite or Transition Care cannot occur during Support Period and Support Plan Review.

If a client's record currently contain multiple decision dates, then the Delegate can only make changes to the latest decision date.

1. Before making changes to the start date of the delegate decision, the declarations must be ticked and the Offline approval form must be attached.
2. Go to Delegate Decisions and Comments and select the listing to be changed, then select the **Edit** (pencil) button next to the Decision Date section.



3. A Pop-up screen prompting to **Edit delegation date** will appear. Enter all the required information. For your convenience, choose the date picker to enter the Delegation date and the Time Picker (clock) to enter the Delegation time. Select **SAVE TO PLAN**.



- You will notice two banners (Green and Blue) confirming the action and status.

**You have successfully entered a correction for the delegation date.**

**Care approval correction in progress.**

- Select **SUBMIT FOR AGED CARE ASSESSMENT (ACAP) PROGRAM.**

Delegate decisions and comments

Support Plan Review: Submitted on 12 November 2025

Requested Changes  
Requested date: 25 November 2025

Decision date (Support Plan Review)  
25 November 2025 12:00 AM (Australian Eastern Standard Time)

Support Plan Review: Submitted on 12 November 2025

Decisions

Recommend that the client receive  
**Home support**

Decision date (Support Plan Review)  
12 November 2025 03:27 PM (Australian Eastern Standard Time)

Assessment: Submitted on 12 November 2025

Decisions

Recommend that the client receive  
**Home support**

Recommend that the client receive  
**Home modifications**

Decision date (Assessment)  
12 November 2025 03:06 PM (Australian Eastern Standard Time)

**SUBMIT FOR AGED CARE ASSESSMENT (ACAP) PROGRAM** RETURN TO CLIENT

Requesting the removal and addition of different care classification within a care type within the same correction request

- To request to remove a classification or service approval that you have entered incorrectly, select the remove (bin) button next to the decision.

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

**IAT Outcome and Classifications**

Current assessment type: Comprehensive Assessment  
IAT Outcome: SaH Classification 5

Delegate decisions and comments

Assessment: Submitted on 15 July 2025

Requested Changes  
Requested date: 4 September 2025

**Residential Respite Care**

Priority for this care type: High ?

Approval starts: 23 July 2025

Declaration: Yes

Reason DEMMI not completed: High



2. A pop-up will display. Confirm your request to remove the incorrect record by selecting **REMOVE RECOMMENDATION**.

The screenshot shows a teal header with the text 'Remove Residential Respite Care'. Below the header is a white box containing the question 'Do you want to remove this recommendation?'. At the bottom right of the white box are two buttons: 'REMOVE RECOMMENDATION' (highlighted with a red box) and 'CANCEL'.

3. A green banner will then display to confirm that the care approval has been successfully removed.

The screenshot shows a section titled 'Requested Changes' with the subtext 'Requested date: 4 September 2025'. Below this is a red-bordered box containing a message: 'Residential Respite Care' followed by 'Residential Respite Care has been removed as part of this Care Approval Correction'. To the right of this message is a red 'X' icon. Below the red-bordered box is a green banner with a white checkmark and the text 'You have successfully removed a Care Approval.' Below the green banner is a light blue banner with an information icon and the text 'Care approval correction in progress.' At the bottom left of the section is a field labeled 'Decision date (Assessment)'.

The screenshot shows a green banner with a white checkmark on the left and the text 'Service successfully removed.' on the right. There is a small 'X' icon in the top right corner of the banner.

4. To then add the correct program or service approval as intended by the clinical assessor and the Clinical Assessment Delegate, select **ADD A CARE TYPE FOR DELEGATE DECISION**.

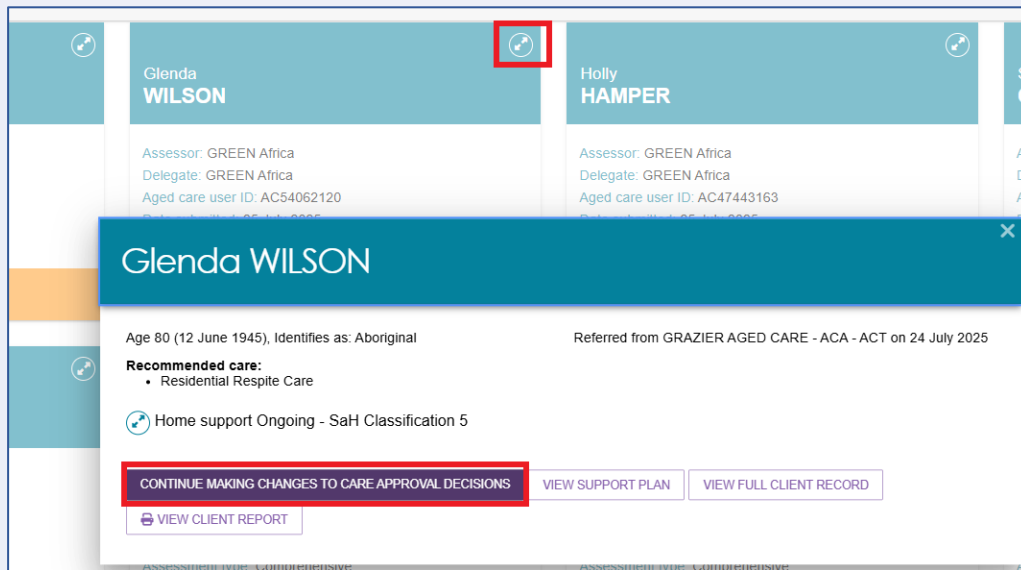
The screenshot shows the 'Requested Changes' section with the 'Residential Respite Care' message and the 'Decision date (Assessment)' field showing '4 September 2025 12:00 AM (Australian Eastern Standard Time)'. Below the decision date field is a button labeled 'ADD A CARE TYPE FOR DELEGATE DECISION' (highlighted with a red box). At the bottom of the section are two buttons: 'SUBMIT FOR AGED CARE ASSESSMENT PROGRAM (ACAP) DECISION' and 'RETURN TO CLIENT'. A light blue banner at the bottom right contains an information icon and the text 'Care approval correction in progress.'

- In the pop-up, add the care type, including the correct service level and priority for the Clinical Assessment Delegate decision. Once you have successfully completed the required fields (marked by a red asterisk **\***) select **SAVE TO PLAN**.

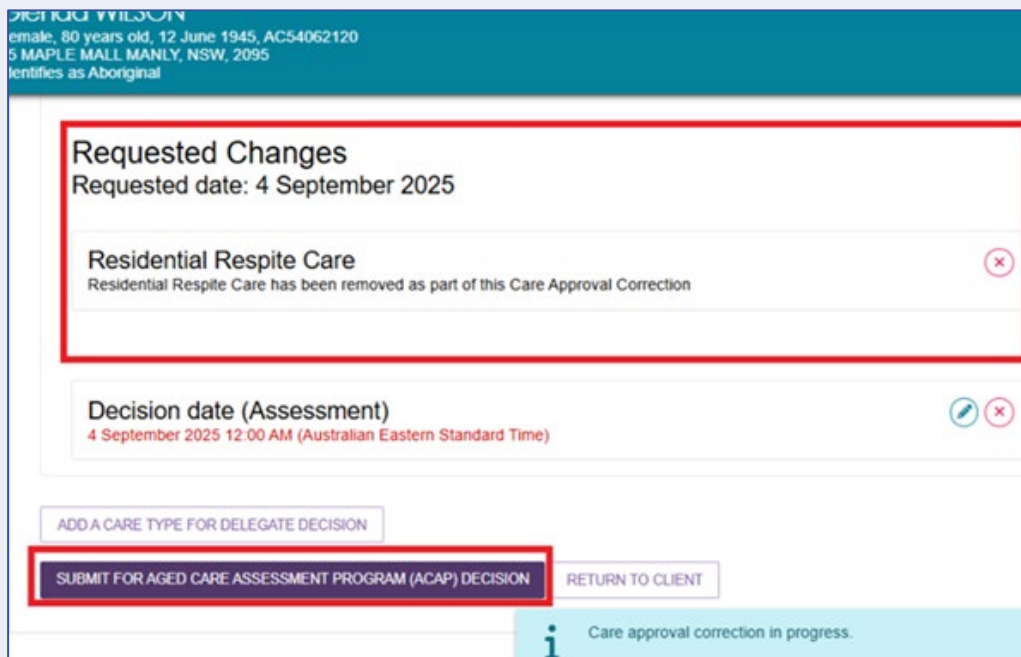
- After successfully saving the changes to the approval, a blue banner will apply outlining that the care approval correction is in progress.

- If you had to exit the correction screen before submitting for decision, you can navigate back to the **DECISION HISTORY** tab under **Delegate Decisions** and select the client. The client will have an **UPDATE PENDING** status.

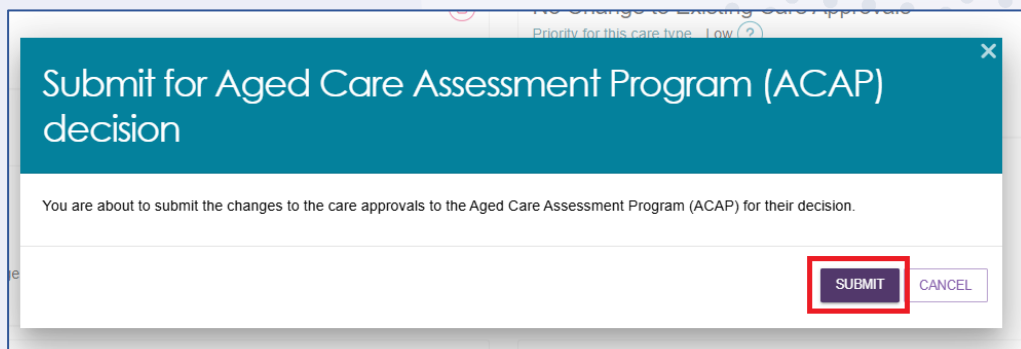
8. Select **CONTINUE MAKING CHANGES TO CARE APPROVAL DECISIONS** button in the expanded client card on the Decision History page.



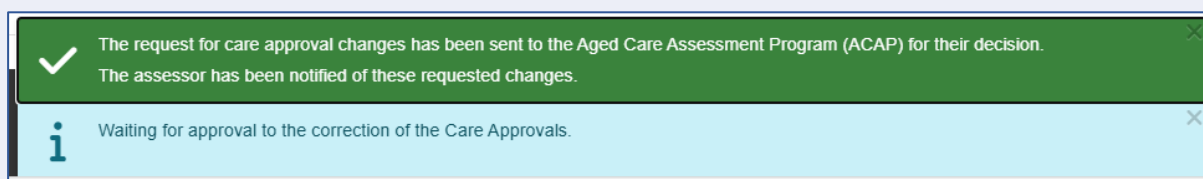
9. You will be able to see the requested changes displayed. When you have made the required changes to the care approval decisions, select **SUBMIT FOR AGED CARE ASSESSMENT PROGRAM (ACAP) DECISION**.



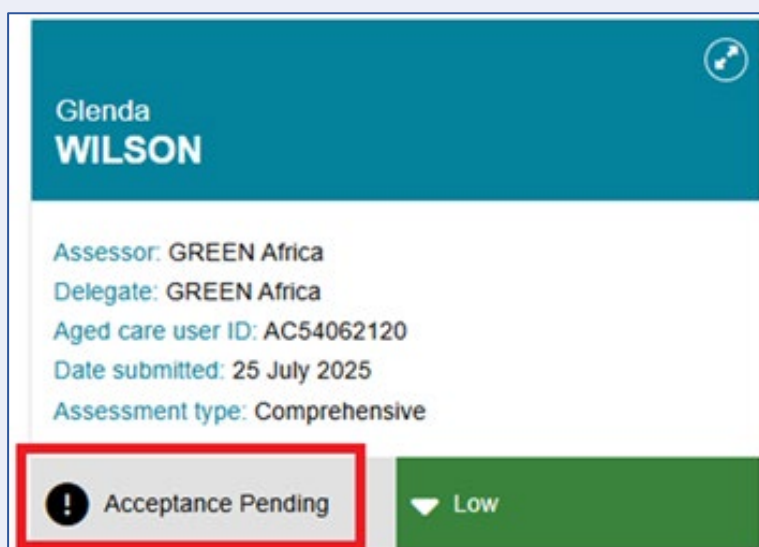
A pop-up message will display requesting confirmation to proceed. Select **SUBMIT**.



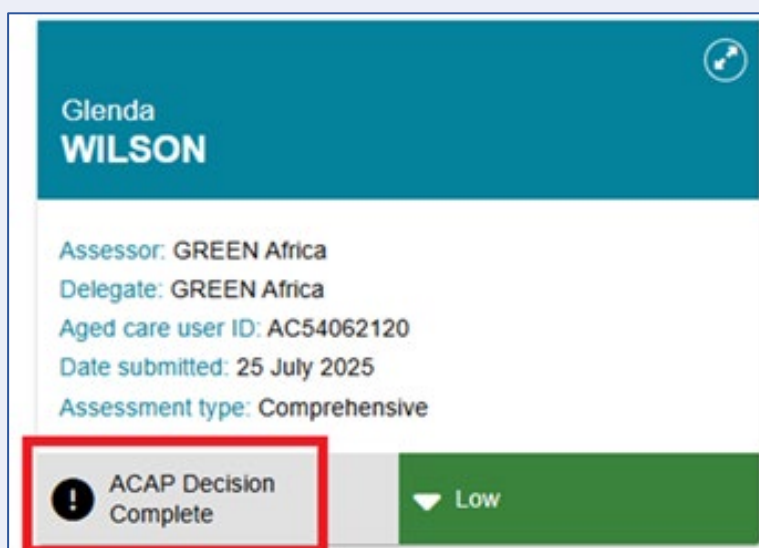
10. You will receive a confirmation message that the correction of the request will be received by the Department's Aged Care Assessment Program (ACAP) delegate.



11. The client will be displayed in the **Decision history** tab with a status of **ACCEPTANCE PENDING**.



12. Once the **AGED CARE ASSESSMENT PROGRAM (ACAP)** decision has been actioned and finalised by the delegate (in staff portal), the status will be updated accordingly.



- There will also be a notification advising of the decision in your **Tasks and notifications** page. You will be able to filter by last name, first name and Aged Care User ID as well as use **Advanced Search** functionality to help you find notifications for certain clients.

The notification itself will contain links back to the client record and the correction request. It will also allow you to remove the notification from the page.

- Once the Clinical Assessment Delegate has made their decision on the correction, you will receive another notification advising that the correction has been completed.
- You will also be able to see the assessment status reflect this when it changes to **ACAP Decision Complete** in your **Decision history** tab. Additional information regarding the correction decision will be visible by selecting the expand arrow, including the date and details of the correction.

- A record of the corrections history for the client can be viewed by selecting **VIEW CORRECTIONS HISTORY**.

## Requesting and Approving Care Extensions

Care extensions can be requested by clinical assessors or service providers as follows:

- For Residential Respite Care and Transition Care approvals, service providers can request care extensions on behalf of the client through the My Aged Care Services and Support Portal.
- For Residential Respite Care, clinical assessors can also generate a care extension for a person living in the community who requires additional respite through the assessor portal.

In cases where a client has a valid Residential Respite Care approval and requires additional Residential Respite days but is currently living at home and not currently receiving residential aged care services, a service provider will not be able to request an extension on behalf of the client. The Clinical Assessment Delegate will instead be able to initiate the care extension on behalf of the client.

If you are unable to complete a care extension request for a client via the assessor portal, you should call the Aged Care Service Provider and assessor Helpline on 1800 836 799.

To make a decision about care extensions, follow the steps below.

1. The extension request will appear in the **Decision pending** tab under **unassigned**. It will have a status of **Acceptance Pending**. Open the client's card in card or list view by selecting the Expand icon.

Home | Delegate decisions

### Decision history

Decision pending | Decision history

Filter by

Sort DecisionsPending by: Assessment Status | In order of: In Order | GO

Current sort order is Assessment Status

<b>Janees CITIZEN</b> Assessor: FLOWER Emily Aged care user ID: AC60163045 Date submitted: 7 September 2022 Assessment type: Comprehensive Acceptance Pending   Medium	<b>Eddy EXTENSION</b> Assessor: FLOWER Emily Delegate: FLOWER Emily Aged care user ID: AC39121652 Date submitted: 31 January 2022 Assessment type: Comprehensive Acceptance Pending   Low
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Assign the client to yourself if not already done, then the client will now appear under **My Decisions**. Select **START DECISION PROCESS**.

### Eddy EXTENSION

Age 89 (15 February 1933)  
Referred from Suncorp ACAT Outlet on 31 January 2022  
Recommended care  
• Residential Respite Care  
Transmission status to DHS: Submitted

**START DECISION PROCESS** | VIEW SUPPORT PLAN | VIEW FULL CLIENT RECORD | VIEW CLIENT REPORT

2. You will see the care extension request. Review the information and select **MAKE EXTENSION DECISION**.

The screenshot shows the 'Support plan and services' interface. At the top, there is a navigation bar with tabs: 'Identified needs', 'Goals & recommendations', 'Decisions' (highlighted), 'Manage services & referrals', 'Associated People', and 'Review'. A 'PRINT COPY OF SUPPORT PLAN' button is located in the top right. Below the navigation, the 'Current care approvals' section displays details for 'Residential Respite Care': Priority for this care type is 'Low', Approval starts on '31 January 2022', Reason for care is 'zddsad', and Source system is 'Gateway'. The 'Recommended care requiring delegate decision' section shows a 'Care extension: Residential Respite Care' with details: Service provider 'ABC Health Care', Proposed extension start date '23 June 2022', Proposed number of extension days '21', and Reason for extension 'Carer stress'. A red box highlights the 'MAKE EXTENSION DECISION' button. Below this button, a message states 'This extension request is awaiting delegate decision'.

In the pop-up, select **Yes** or **No** with regards to granting the extension, and fill out the other fields.

The pop-up form is titled 'Make a care extension decision'. It includes a close button in the top right corner. The text reads: 'All fields marked with an asterisk (\*) are required. Do you want to grant the 21 day extension for Residential respite?'. There are two radio button options: 'Yes' (selected) and 'No'. Below this, there is a date field labeled 'When does the extension start? \*' with the value '20/07/2017' and a calendar icon. At the bottom, there is a text area for 'Rationale \*' with a note 'Maximum 255 characters'. At the bottom right, there are two buttons: 'MAKE DECISION' and 'CANCEL'.

- A notification will be displayed, and the extension request will show with a status of **Granted** or **Not Granted**.

**Support plan and services**

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

### Current care approvals

**Residential Respite Care**  
 Priority for this care type: Medium (?)  
 Approval starts: 7 September 2022  
 Source system: Gateway

**Care extension: Residential Respite Care**  
 Extension start date: 7 September 2022  
 Extension stop date: 27 September 2022  
 Number of extension days: 21  
 Reason for extension: Severity of the care recipient's condition

**Granted**

- If the service provider requested the extension, they will receive a notification advising them of the decision in their **Tasks and Notifications** in the Services and Support Portal.

Type	Due Date	Received Date	Category	Title/Description	Activity Id	Portal
Notification	20/07/2017		Client Services	<b>Care Extension Request</b> A formal Delegate Decision has been made for a care extension request. Details are as follows - Aged Care User Id: AC91417612 Service : Residential Respite High Care Requested By : Requested by Outlet name : Decision : Update Accepted Delegate Name :	1-20851939775	Service Provider Portal