

Assessor Portal User Guide 11 - Assessment Delegate Support Role

The Delegate Support role in the My Aged Care assessor portal (assessor portal) enables anyone assigned the role to perform administrative functions to support the Assessment Delegate. For example, the Assessment Delegate Support will be able to print support plans, as well as generate, print and upload referral code letters and approval letters.

The Assessment Delegate Support operates under the instructions of the Assessment Delegate.

Clinical Assessment Delegates are able to approve an older person for all service groups, classification types and classification levels under the *Aged Care Act 2024*.

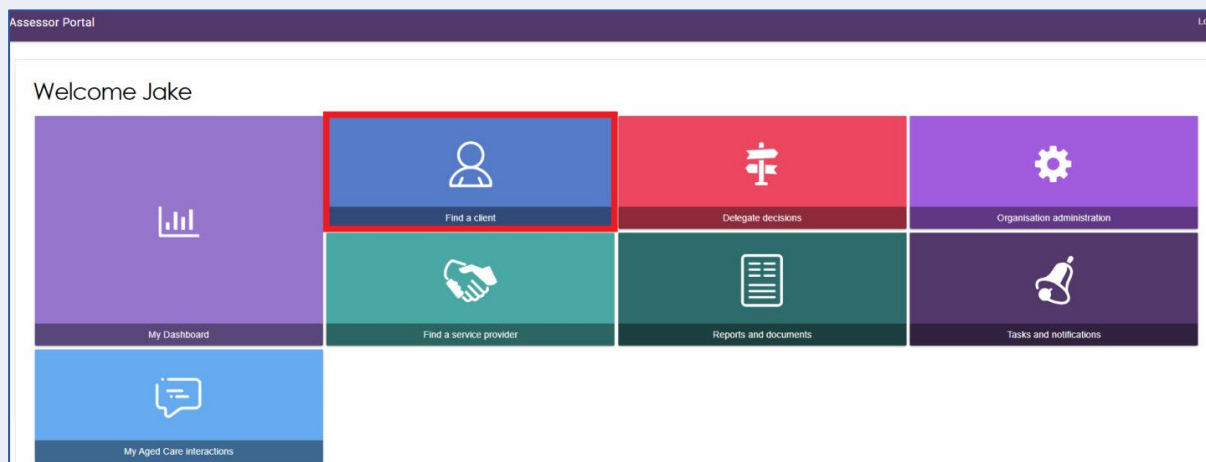
Non-clinical assessment delegates are restricted to approving entry level home support, Assistive Technology (AT) or Home Modification (HM) services (i.e. with classification levels of CHSP class, AT CHSP or AT-HM).

Table of contents

Accessing client information	2
Printing the support plan	4
Generating referral code letters	6
Notice of Decision Letters	8
Generating Approval Letters	8
Uploading Approval Letters	10
Generating Non-Approval Letters	16
Uploading Non-Approval Letters	18

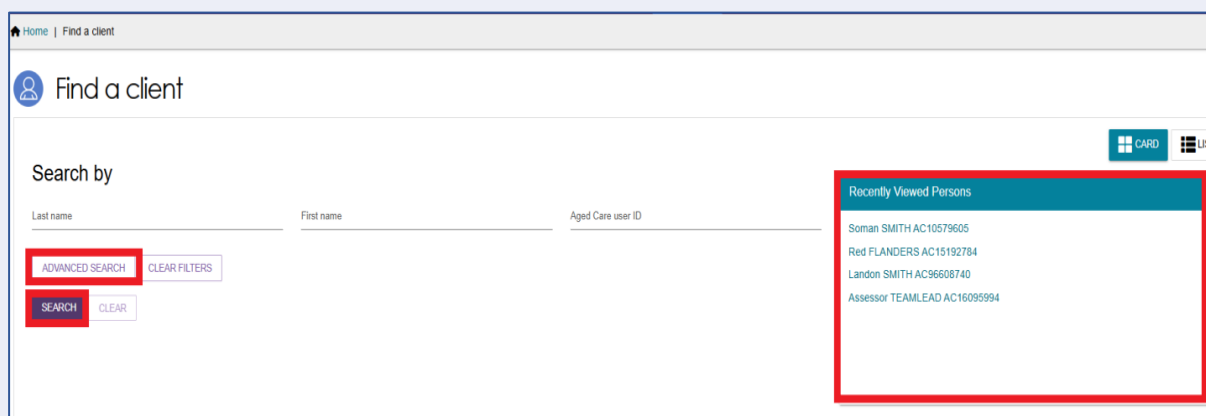
Accessing client information

1. To locate information about a client and print a copy of the client record, select the **Find a client** tile from your homepage.

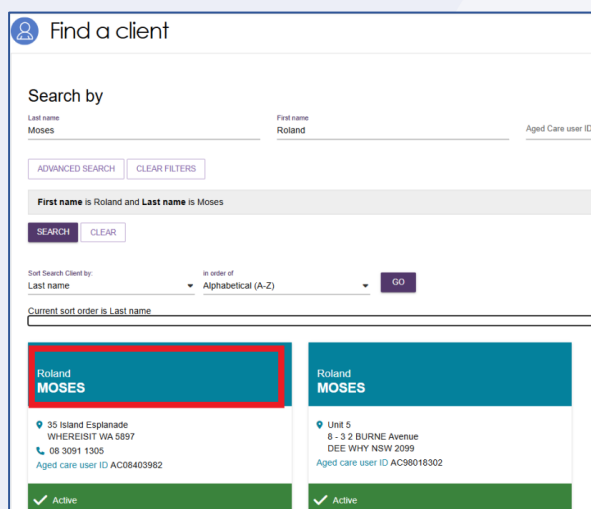


2. Use the **Find a client** function to search for the client. Client records you have recently viewed will appear in the **Recently Viewed Persons** section, and depending on your browser, this will either appear on the right side or the bottom section of the page.

The **ADVANCED SEARCH** functionality allows you to search by additional fields. Refer to the [My Aged Care – Assessor Portal User Guide 1 – Registering and referring clients for assessments](#) for more information on using this functionality.



3. Any matching search results will be displayed. Select the client's name.



4. You will be able to sort the matching results by a number of criteria including last name, first name, Aged Care User ID, suburb, state, post code, date of birth and more. Select the criteria, the order of display as required and select **GO**.

Find a client

Search by

Last name First name

ADVANCED SEARCH CLEAR FILTERS

SEARCH CLEAR

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

Last name
First name
Aged Care User ID
Suburb
State
Post code
Date of birth
Client status
Home Contact

Unit 5
8 - 3 2 BURNE Avenue
DEE WHY NSW 2099
Aged care user ID AC98014

✓ Active

5. Selecting the client's name tile will take you to the Client Summary. You can view and print a RTF (Rich Text File) of the client record by selecting the **VIEW CLIENT REPORT** button.

Captain Roland MOSES
Male, 65 years old, 14 June 1939, AC08403982
35 ISLAND ESPLANADE WHEREISIT, WA, 5897

Primary contact: Roland Moses (self) - 08 3091 1305
View support network

Client summary

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

Client summary

Assessments

Comprehensive Assessment
Awaiting Delegate Decision on 16 May 2025
Happy Assessments - ACA - VIC 4 02 2404 7561

Recommendations and approvals

Meals - Meal delivery, Meal preparation

Service delivery status

No referrals issued

Help at home - Entry level support (Commonwealth Home Support Programme)
Aged care (nursing) home (Residential Care)
Support at Home

View support at home letters

VIEW CLIENT REPORT

6. A **Generating Report** pop up appears, then the Rich Text File (RTF) appears on your browser ready to be downloaded or opened.

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

Downloads

AC08403982 Roland Moses Client Record Snapshot May 2025.RTF
Open file

See more

7. Opening the RTF shows a Copy of the Client Record.



Roland Moses
Aged Care ID: AC08403982
Date of Birth: 14/06/1939

Client Details

Age 85 **Gender** Male

Medicare number not applicable **DVA Card number** not applicable

Address 35 Island Esplanade, WHEREISIT, WA, 5897, Australia

Lives With	Lives alone	Accommodation type	Independent Living
Phone – Home	+610830911305	Phone – Mobile	+610418357043
Email	captainmoses@hotmail.com	Fax	not applicable
Preferred phone	Home	Preferred correspondence method	not applicable
Country of Birth	England	Ethnicity	British
Preferred Language	English	Requires Help to Communicate	not applicable
TIS Required	not applicable	NRS Required	N
Marital status	Widowed	Aboriginal and/or Torres Strait	No - Neither

Printing the support plan

1. To view and print the support plan, navigate to the **Plans** tab in the client record. From here, select **SUPPORT PLAN**.

Dick VAN DYKE
Male, 90 years old, 13 December 1935, AC45875978

Primary contact: Dick Van Dyke (self)
No support relationships recorded

Plans [VIEW CLIENT REPORT](#)

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

Tasks and Notifications

Current Episode
Episode ID: 2-22005EZA
2 February 2026 - Present

SUPPORT PLAN

Recommendations
• Residential Respite Care

Upcoming Review(s)
No upcoming reviews scheduled

Assessment history

- Comprehensive Assessment 2 February 2026
- Screening 2 February 2026

Plan history
No plan history available

Review history
No review history available

2. The **Goals & recommendations** tab will be displayed. You can print a copy of the support plan by selecting **PRINT COPY OF SUPPORT PLAN**.



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 2
Recommended classification: SaH Classification 2
AT Low

Client concerns and goals

No client concerns or goals.

Other recommendations

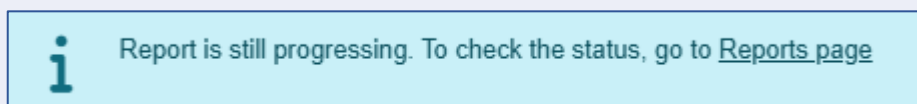

Recommend that the client receive
Residential Respite Care
2 February 2026


Recommend that the client receive
Home support


Recommend that the client receive
Assistive technology

RETURN TO CLIENT

- If the report is taking longer than usual, you may receive an information message at the bottom of the screen with a hyperlink to the Reports page.



- The support plan is available in the Reports page. Select the **View** link to view the support plan. You can also access this page by going to the Reports and Documents tile from the Assessor portal home page.

Home | Reports and documents



Reports and documents

Reports
Forms
Links

My Reports

Name	Requested Date	Status
Dick Van Dyke Support Plan 4 June 2026	4 June 2026	Ready - View

Reports List

Name	Description	Formats
No Records found		

- The Support Plan is now ready to be downloaded from your browser then printed from your computer or device.

The below example shows a support plan in the Downloads section of the Microsoft Edge browser.

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

Assessor Portal

Home | Reports and documents

Reports and documents

Reports Forms Links

My Reports

Name	Requested Date	Status
Dick Van Dyke Support Plan 4 June 2026	4 June 2026	Downloaded - View

Generating referral code letters

1. Go to the client's support plan by going to the **Plans** tab in the client record, then select **SUPPORT PLAN**.

Mrs Danthony KOHL
Female, 87 years old, 14 January 1939, AC81719312
Lot Number 841 2 CEDAR CREEK ROAD CEDAR CREEK, QLD, 4520

Primary contact: Danthony Kohl (self) - 02 7776 4641
[View support network](#)

Plans

[VIEW CLIENT REPORT](#)

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

Tasks and Notifications

Current Episode

Episode ID: 1-4TXQWF3
26 August 2025 - Present

SUPPORT PLAN

Recommendations

- Residential Respite Care
- Home maintenance and repairs

Assessment history

- Comprehensive Assessment 26 August 2025
- Home Support Assessment 3 December 2019
- Home Support Assessment 30 August 2016
- Screening 25 August 2016

2. Go to the **Manage services & referrals** tab. From here, you can view the client's service referrals and generate a copy of the referral code letter.

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 2
Recommended classification: SaH Classification 2
AT Low

3. Select **GENERATE REFERRAL CODE LETTER** at the bottom of the page.

Support plan and services

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

Inbound referral details

Services not yet in place

- Help at Home
- Aged Care Homes
- Support at Home

Services in place

- Help at Home

GENERATE REFERRAL CODE LETTER

RETURN TO CLIENT

PRINT COPY OF SUPPORT PLAN

4. The Referral Code Letter is available in the Reports page. Select the **View** link to view the letter. You can also access this page by going to the Reports and Documents tile from the Assessor portal home page.

Reports and documents

Reports Forms Links

My Reports

Name	Requested Date	Status
Danthony Kohl Referral Code and List of Providers 4 June 2026	4 June 2026	Ready - View

Reports List

Name	Description	Formats
No Records found		

5. The Referral Code Letter is now ready to be downloaded from your browser then printed from your computer or device. The below example shows the letter in the Downloads section of the Microsoft Edge browser.

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

Assessor Portal

Home | Reports and documents

Reports and documents

Reports Forms Links

My Reports

Name	Requested Date	Status
Danthony Kohl Referral Code and List of Providers 4 June 2026	4 June 2026	Downloaded - View

Reports List

Name	Description	Formats
No Records found		

Downloads

Danthony Kohl Referral Code and List of Providers 4 June 2026.PDF

Open file

See more

Notice of Decision Letters

The Delegate Support can generate and upload the Notice of Decision (NoD) letter, after the delegate decision is completed. This applies to both Approval letters and non-Approval letters.

NoD Letters are also sent to any of the older person's registered supporters (except for supporters-lite). Refer to [My Aged Care – Assessor Portal User Guide 2 – Registering support people and adding relationships](#) for more information.

Generating Approval Letters

1. Go to the **Delegate Decisions** tile from the home page and select the client card or listing from the **Decision History** tab.

Home | Delegate decisions

Decision history

Currently viewing ABC Outlet

Decision pending **Decision history**

CARD LIST

Filter by

Sort Decisions Pending by: Date Submitted in order of Latest to Earliest GO

Current sort order is Date Submitted 1 to 20 out of 100 matching results

Denzel WASHINGTON
Assessor: GREEN Africa
Delegate: GREEN Africa
Aged care user ID: AC58482423
Date submitted: 3 June 2026
Assessment type: Comprehensive
Finalised (Assessment) Low

Jonas SERRANO
Assessor: FREE Prospect
Delegate: KALE Veg
Aged care user ID: AC82435447
Date submitted: 29 May 2026
Assessment type: Comprehensive
Finalised (Support Plan Review) Low

Tom TANCOCO
Assessor: GREEN Africa
Delegate: FREE Prospect
Aged care user ID: AC39652359
Date submitted: 29 May 2026
Assessment type: Comprehensive
Delegate Decision Complete (Assessment) Medium

2. Select **VIEW SUPPORT PLAN**

Denzel WASHINGTON

Age 71 (28 December 1954) Referred from ABC Outlet on 16 April 2026

Recommended care:

- Domestic assistance
- Personal care
- Transport

Home support Ongoing - SaH Classification 7

VIEW SUPPORT PLAN VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

3. This will then take you to the client's Decisions tab of the Support Plan and Services page. Select **GENERATE APPROVAL LETTER** at the bottom of the page.

The screenshot shows the 'Support plan and services' page. At the top, there are tabs: 'Identified needs', 'Goals & recommendations', 'Decisions' (highlighted with a red box), 'Manage services & referrals', and 'Associated People'. Below the tabs, there's a section 'IAT Outcome and Classifications' with details: 'Current assessment type: Comprehensive Assessment', 'IAT Outcome: SaH Classification 7', 'Existing classification: SaH Classification 7', and 'CHSP'. Below this is 'Current care approvals' with a recommendation to 'Home support'. Then 'Delegate decisions and comments' with two assessment entries. At the bottom, there are buttons: 'GENERATE APPROVAL LETTER' (highlighted with a red box), 'UPLOAD APPROVAL LETTER', and 'RETURN TO CLIENT'.

4. Confirm the client, then select **GENERATE APPROVAL LETTER**.

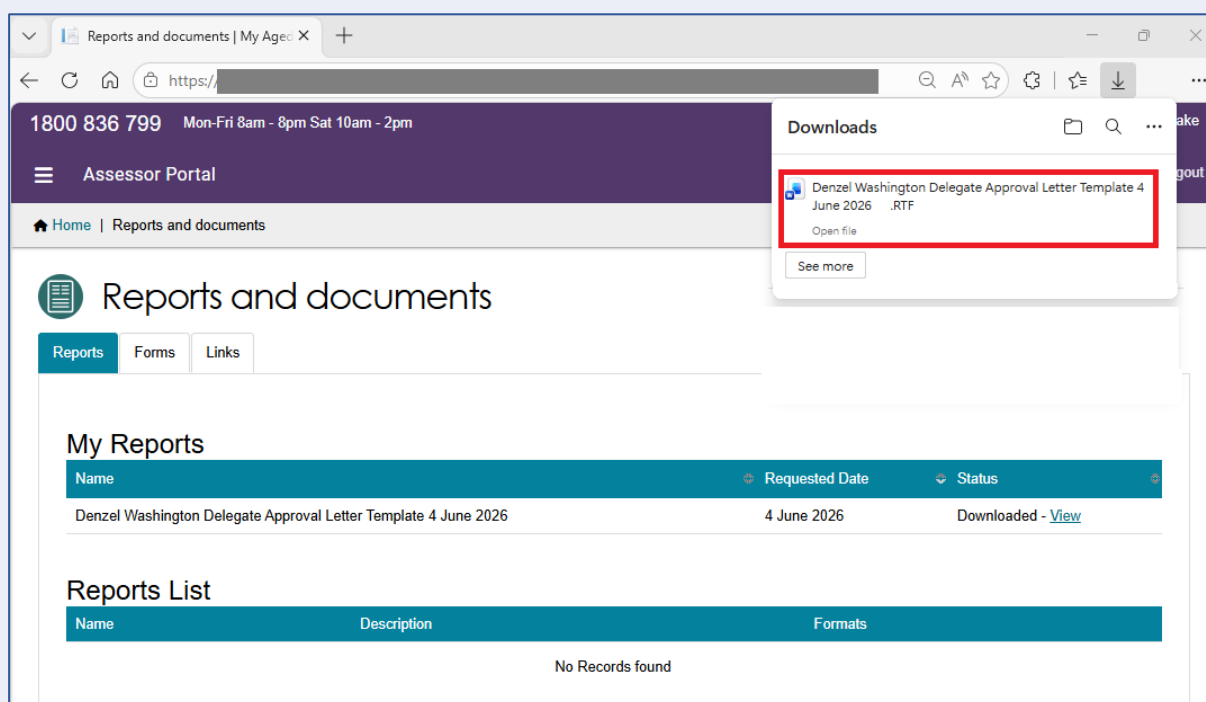
The screenshot shows a modal titled 'Generate approval letter'. It contains the text 'You are generating the approval letter for Denzel WASHINGTON'. At the bottom right, there are two buttons: 'GENERATE APPROVAL LETTER' (highlighted with a red box) and 'CANCEL'.

5. The letter will be shown in the **Reports and Documents** tile of the portal, with a status of Processing.

When ready, the Status will display a **View** link for you to select.

The screenshot shows the 'Reports and documents' page. There are tabs: 'Reports' (highlighted with a red box), 'Forms', and 'Links'. Below the tabs, there's a section 'My Reports' with a table. The table has columns: 'Name', 'Requested Date', and 'Status'. One row is shown: 'Denzel Washington Delegate Approval Letter Template 4 June 2026', '4 June 2026', and 'Ready - View' (where 'View' is a link highlighted with a red box). Below this is a 'Reports List' section with a table that has columns: 'Name', 'Description', and 'Formats'. It shows 'No Records found'.

6. The letter will be downloaded from the browser to your computer or device, as a .RTF (Rich Text Format) document. You can now print it for your Delegate to sign.



! All NoD Letters needs to be signed by the Delegate, and converted into PDF format, before uploading to the portal.

Uploading Approval Letters

Once the Assessment Delegate has 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 this by using the **Add An Attachment** button in the **Attachments** tab on the client record.

For CHSP only recommendations, NoD letters can also be uploaded from the Goals & Recommendations tab.

For Second unit of Restorative Care Pathway (RCP) approval letters, please complete the template 'Second concurrent unit of RCP funding – Approval or Non-approval', in the Reports and Documents tile of the Assessor Portal.

Then, use the **Upload Approval Letter** button to upload this letter.

Assessor Portal

Logout

[Home](#) | Reports and documents

Reports and documents

Reports

Forms

Links

Forms

Self-Service Form - Abbey Pain Scale [pdf 216.57KB]
 Self-Service Form - Alcohol Use Disorders Identification Test [pdf 286.85KB]
 Self-Service Form - Application for Care - October 2020 [pdf 354.04KB]
 Self-Service Form - Barthel Index of Activities of Daily Living [pdf 217.14KB]
 Self-Service Form - Brief Pain Inventory [pdf 256.86KB]
 Self-Service Form - Caregiver Strain Index [pdf 148.46KB]
 Self-Service Form - Comprehensive Assessment and Support Plan - October 2018 [pdf 441.98KB]
 Self-Service Form - Geriatric Depression Scale [pdf 217.91KB]
 Self-Service Form - Home Support Assessment and Support Plan - October 2018 [pdf 483.96KB]
 Self-Service Form - IQ CODE [pdf 218.93KB]
 Self-Service Form - K-10 [pdf 943.17KB]
 Self-Service Form - KICA-COG images [pdf 539.52KB]
 Self-Service Form - Kimberley Indigenous Cognitive Assessment - ADL [pdf 148.55KB]
 Self-Service Form - Kimberley Indigenous Cognitive Assessment - Carer [pdf 695.12KB]
 Self-Service Form - Kimberley Indigenous Cognitive Assessment - Cognitive Assessment (KICA-COG) [pdf 895.81KB]
 Downloads - Mini Nutritional Assessment [pdf 81.38KB]
 Downloads - Mini Nutritional Assessment Tool v1.0 [pdf 307.28KB]
 Self-Service Form - Modified Caregiver Strain Index [pdf 217.44KB]
 Template - Notice of Decision - Approval letter - CHSP ONLY [docx 185.89KB]
 Template - Notice of Decision - Non-Approval letter [docx 181.32KB]
 Self-Service Form - Offline Approval Form - February 2017 [docx 113.64KB]
 Self-Service Form - Older Americans Resources and Services (OARS) - Instrumental ADL [pdf 942.75KB]
 Self-Service Form - Oral Health Assessment Tool [pdf 217.37KB]
 Self-Service Form - Residents Verbal Brief Pain Inventory [pdf 247.28KB]
 Self-Service Form - Revised Faecal Incontinence Scale [pdf 216.65KB]
 Self-Service Form - Revised Urinary Incontinence Scale [pdf 148.11KB]
 Self-Service Form - Rowland Universal Dementia Assessment Scale [pdf 981.57KB]
Template - Second concurrent unit of RCP funding - Approval or Non-approval [docx 80.88KB]
 Downloads - Sensitive Attachment v1.0 [docx 62.40KB]
 Self-Service Form - South Australian Oral Health Referral Pad [pdf 217.59KB]
 Self-Service Form - Standardised Mini-Mental State Examination (SMMSE) [pdf 289.86KB]

From the support plan

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

Plans

[REFER THIS CLIENT FOR ASSESSMENT](#)
[VIEW CLIENT REPORT](#)
[CONTINUE SUPPORT PLAN REVIEW](#)

Client summary

Client details

Support network

Approvals

Plans

Attachments

Services

My Aged Care interactions

Notes

Tasks and Notifications

Residential Funding Classifications

Current Episode

Episode ID: 2-21UJRN04

9 July 2025 - Present

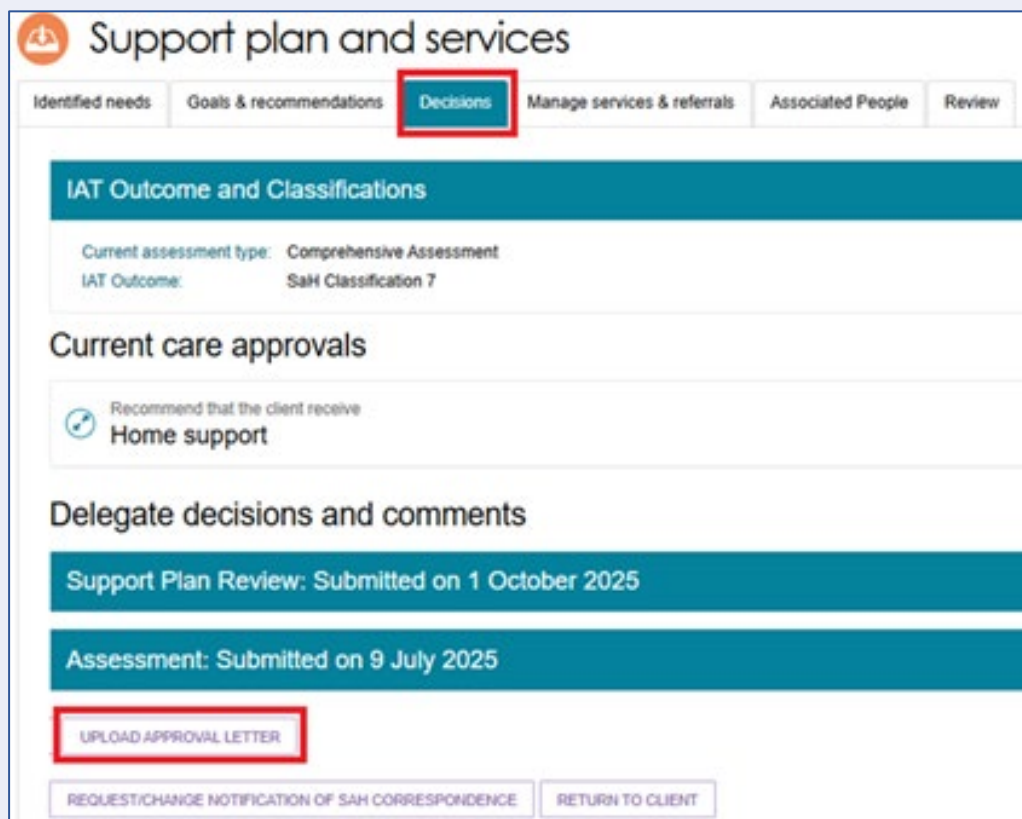
SUPPORT PLAN

Assessment history

- Comprehensive Assessment 9 July 2025
- Screening 9 July 2025

2. The Support Plan and Services page appears.

Select the **Decisions** tab, then Select **Upload Approval Letter** from the bottom of the page, underneath **Delegate decisions and comments**.



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 7

Current care approvals

Recommend that the client receive
Home support

Delegate decisions and comments

Support Plan Review: Submitted on 1 October 2025

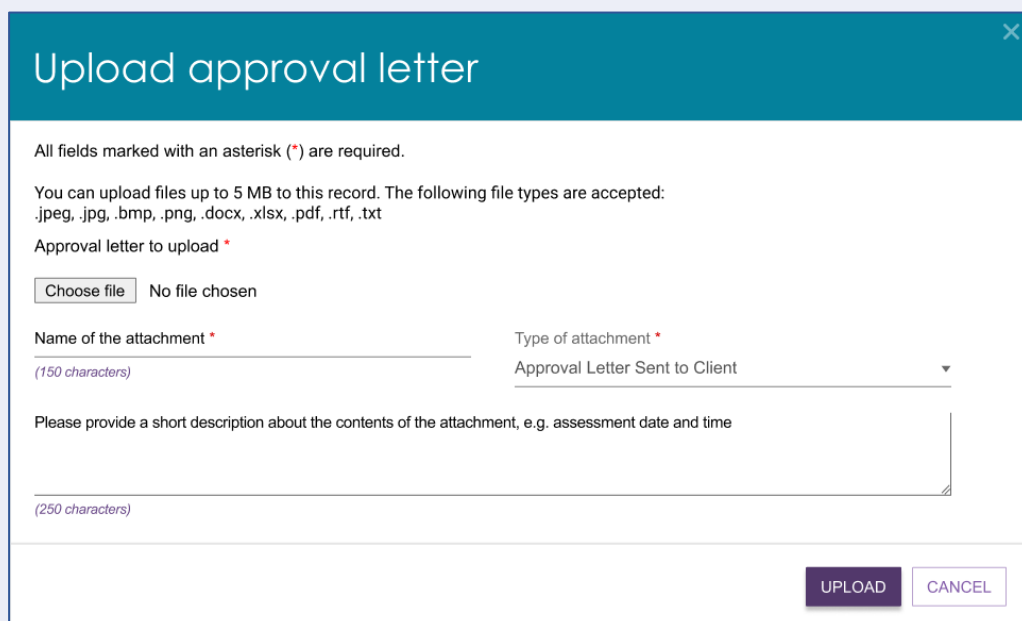
Assessment: Submitted on 9 July 2025

UPLOAD APPROVAL LETTER

REQUEST/CHANGE NOTIFICATION OF SAH CORRESPONDENCE RETURN TO CLIENT

3. The Upload Approval Letter pop up appears. Choose the approval letter file to upload. Enter the name of the attachment. 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

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, .rtf, .txt

Approval letter to upload *

Choose file No file chosen

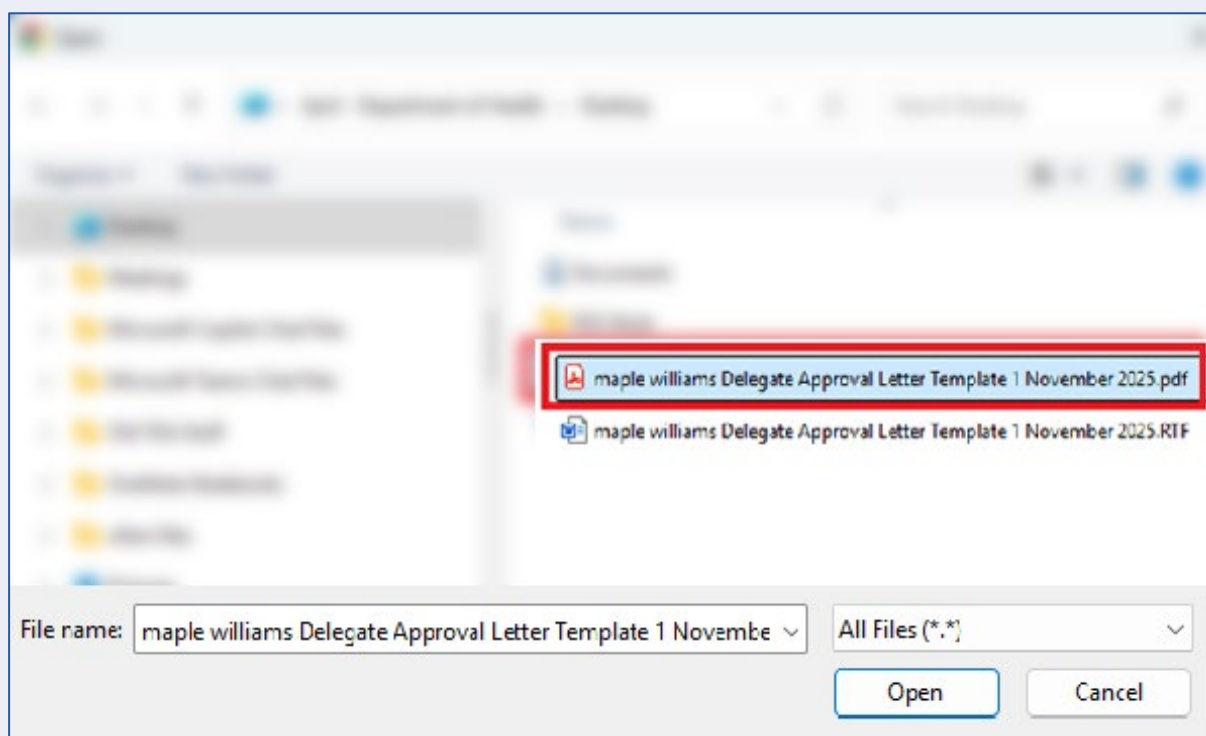
Name of the attachment * (150 characters)

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 (250 characters)

UPLOAD CANCEL

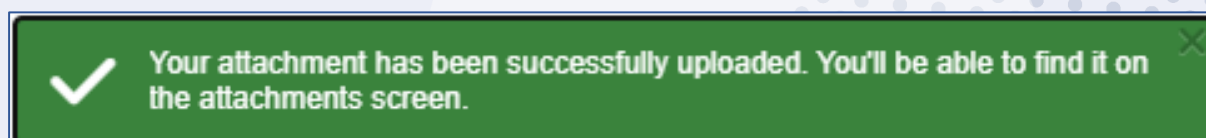
4. Choose the letter and then select **Open**.



5. The letter name will appear next to the Choose File button.
Select **Upload**.

A screenshot of a web form titled 'Upload approval letter'. Below the title, a message states: 'All fields marked with an asterisk (*) are required.' The form has a label 'Approval letter to upload *' followed by a 'CHOOSE FILE' button and the text 'maple williams Delegate Approval Letter Template 1 November 2025.pdf'. At the bottom right of the form are 'UPLOAD' and 'CANCEL' buttons. The 'UPLOAD' button is highlighted with a red rectangular box.

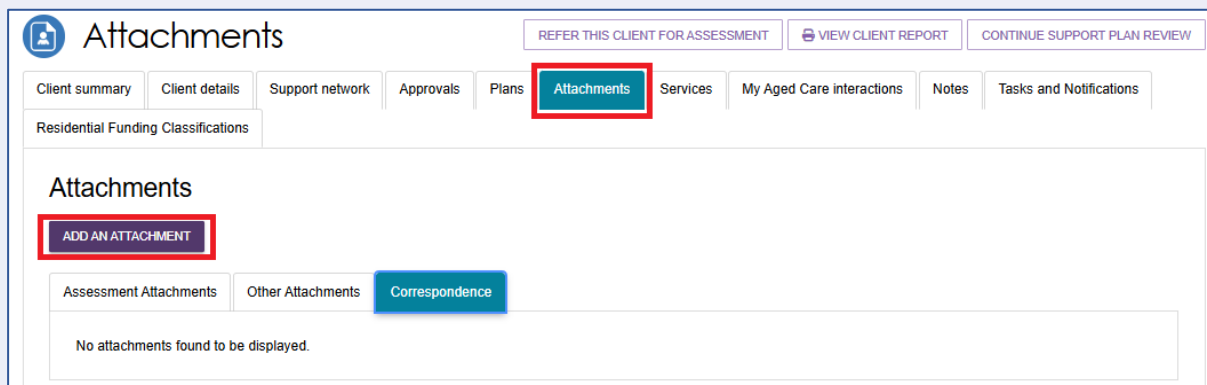
6. A success message appears saying that the attachment is now uploaded onto the Attachments page of the client record.



From the attachments tab

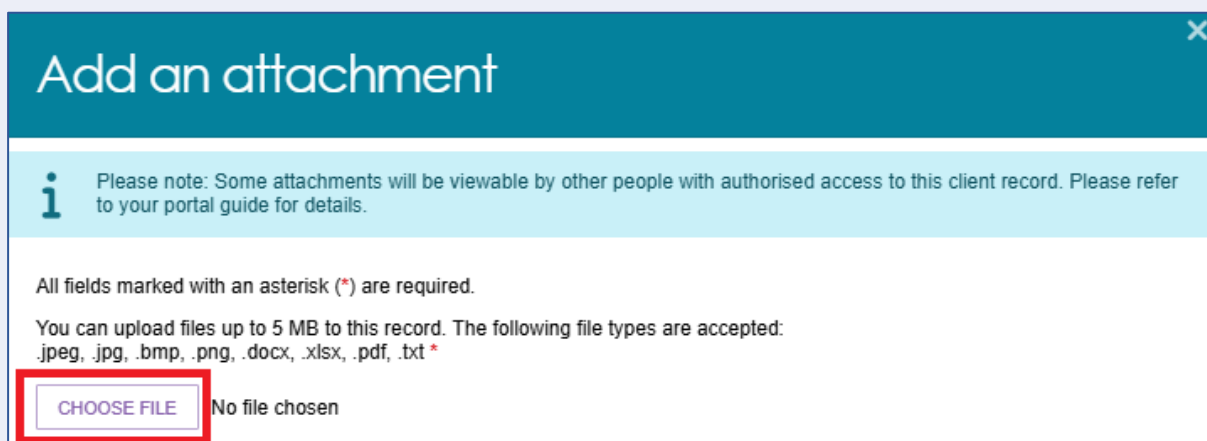
Alternatively, you can upload the letter by using the **Add An Attachment** button in the **Attachments** tab on the client record:

1. Select the client's record and go to the **Attachments** tab. Then, select **Add An Attachment**.



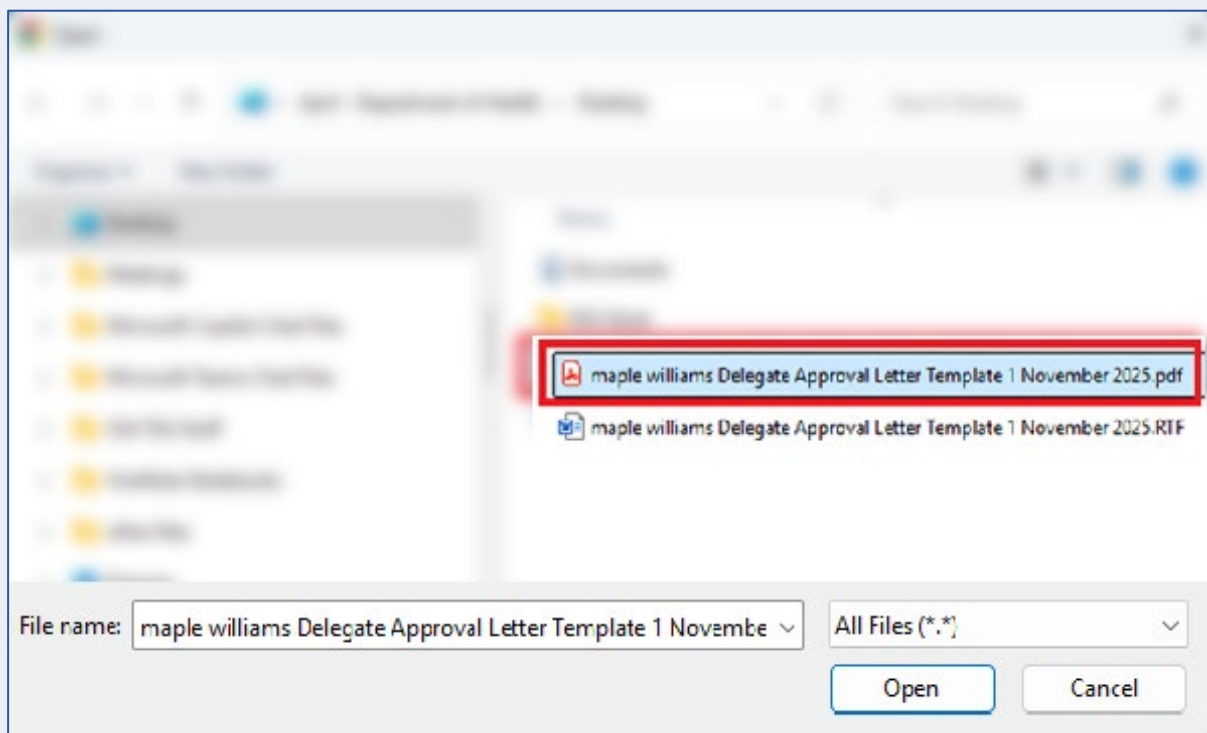
The screenshot shows the 'Attachments' tab selected in a client record. The 'Attachments' tab is highlighted with a red box. Below the tab, the 'ADD AN ATTACHMENT' button is highlighted with a red box. The 'Assessment Attachments' tab is also highlighted with a red box. The 'Correspondence' tab is highlighted with a blue box. The text 'No attachments found to be displayed.' is visible below the tabs.

2. Select **Choose File**



The screenshot shows the 'Add an attachment' dialog box. The 'CHOOSE FILE' button is highlighted with a red box. The text 'No file chosen' is visible next to the button. The dialog box also contains a note about file visibility and a list of accepted file types.

3. Select the approval letter and then select **Open**.



The screenshot shows a file selection dialog box. The file 'maple williams Delegate Approval Letter Template 1 November 2025.pdf' is selected and highlighted with a red box. The 'Open' button is visible at the bottom right of the dialog box.

4. The attachment's name will display next to the Choose File button.

Enter the Name of the attachment and select the Type of attachment as **Approval Letter Sent to Client**. Optionally you can provide a short description about the contents of the attachment such as assessment date and time. Then, select **Upload**.

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

maple willi...r 2025.pdf

Name of the attachment: *

Maple Williams Delegate Approval Letter 1 November 2025

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

(250 characters)

UPLOAD

CANCEL

5. The letter now appears under the **Assessment Attachments** tab of the **Attachments** page.

Home | Find a client | maple WILLIAMS

maple WILLIAMS

Female, 75 years old, 5 September 1950, AC72685944
Lot Number 5 ELDON STREET INDOOROPILLY, QLD, 4068

Primary contact: maple williams (self)
No support relationships recorded

Attachments

REFER THIS CLIENT FOR ASSESSMENT | VIEW CLIENT REPORT | CONTINUE SUPPORT PLAN REVIEW

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

Approval Letter Sent to Client

4 November 2025

Maple Williams Delegate Approval Letter 1 November 2025 [pdf 311.38KB] | HIDE FROM VIEW

Support Plan - External

14 July 2025

AC72685944__2-21UJRNPT-Finalised-20251407092811.pdf [65.18KB]

Accessibility | Privacy | Disclaimer | Terms

Copyright © Commonwealth of Australia

✓

Your attachment has been successfully uploaded. You'll be able to find it on the attachments screen.

Australian Government
Department of Health and Aged Care

myagedcare

i

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

15

Generating Non-Approval Letters

1. Go to the **Delegate Decisions** tile from the home page and select the client card or listing from the **Decision History** tab.

Home | Delegate decisions

Decision history

Currently viewing ABC Outlet

Decision pending **Decision history**

CARD LIST

Filter by

Sort Decisions Pending by: Date Submitted in order of: Latest to Earliest GO

Current sort order is Date Submitted 1 to 1 out of 1 matching result

Brian O'CONNER

Assessor: SHELL Orange
Delegate: FREE Prospect
Aged care user ID: AC11875671
Date submitted: 8 May 2026
Assessment type: Home Support

Delegate Decision Complete (Assessment) Low

2. Select **VIEW SUPPORT PLAN**

Brian O'CONNER

Age 76 (1 January 1950) Referred from ABC Outlet on 8 May 2026

Recommended care:

- No Care Approval

VIEW SUPPORT PLAN VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

3. This will then take you to the client's Decisions tab of the Support Plan and Services page. Select **GENERATE NON-APPROVAL LETTER** at the bottom of the page.

Support plan and services

PRINT COPY OF SUPPORT PLAN

Identified needsGoals & recommendationsDecisionsManage services & referralsAssociated People

IAT Outcome and Classifications

Current assessment type: Home Support Assessment
IAT Outcome: CHSP

Delegate decisions and comments

Assessment: Submitted on 8 May 2026

Decisions

Recommend that the client receive
No Care Approval

Meals

Decision date (Assessment)
4 June 2026

Personal care

Transport

GENERATE NON-APPROVAL LETTER

UPLOAD NON-APPROVAL LETTER

RETURN TO CLIENT

4. The Non-approval letter automatically starts to process in the Reports and Documents section of the portal. When ready, the Status will display a **View** link for you to select.

Home | Reports and documents

Reports and documents

ReportsFormsLinks

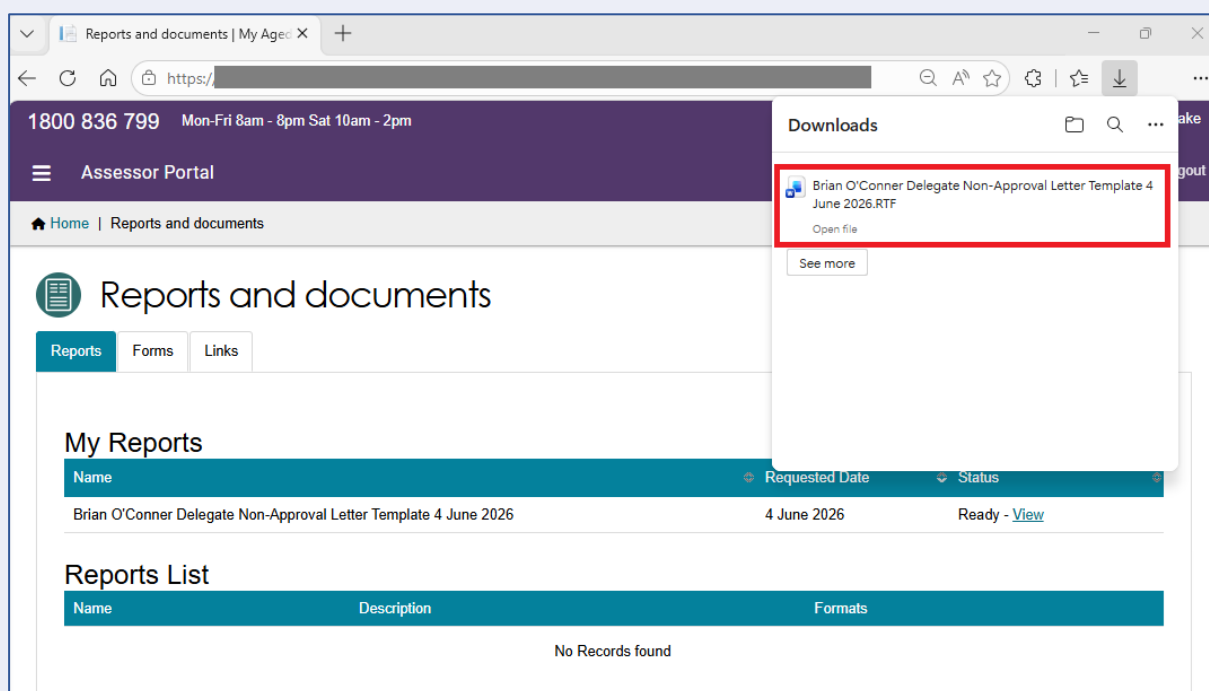
My Reports

Name	Requested Date	Status
Brian O'Conner Delegate Non-Approval Letter Template 4 June 2026	4 June 2026	Ready - View

Reports List

Name	Description	Formats
No Records found		

5. The letter will be downloaded from the browser to your computer or device, as a .RTF (Rich Text Format) document. You can now print it for your Delegate to sign.



! All NoD Letters needs to be signed by the Delegate, and converted into PDF format, before uploading to the portal.

Uploading Non-Approval Letters

Once the Assessment Delegate has 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 by using the **Add An Attachment** button in the **Attachments** tab on the client record.

For Comprehensive assessments, uploading non-approval letter buttons are only available for No Care Approval (or similar).

For CHSP only recommendations, NoD letters can also be uploaded from the Goals & Recommendations tab.

For Second unit of Restorative Care Pathway (RCP) non-approval letters, please complete the template 'Second concurrent unit of RCP funding – Approval or Non-approval', in the Reports and Documents tile of the Assessor Portal.

Then, use the **Upload Non-Approval Letter** button to upload this letter.

Assessor Portal

Logout

[Home](#) | Reports and documents

Reports and documents

Reports

Forms

Links

Forms

- Self-Service Form - Abbey Pain Scale [pdf 216.57KB]
- Self-Service Form - Alcohol Use Disorders Identification Test [pdf 286.85KB]
- Self-Service Form - Application for Care - October 2020 [pdf 354.04KB]
- Self-Service Form - Barthel Index of Activities of Daily Living [pdf 217.14KB]
- Self-Service Form - Brief Pain Inventory [pdf 256.86KB]
- Self-Service Form - Caregiver Strain Index [pdf 148.46KB]
- Self-Service Form - Comprehensive Assessment and Support Plan - October 2018 [pdf 441.98KB]
- Self-Service Form - Geriatric Depression Scale [pdf 217.91KB]
- Self-Service Form - Home Support Assessment and Support Plan - October 2018 [pdf 483.96KB]
- Self-Service Form - IQ CODE [pdf 218.93KB]
- Self-Service Form - K-10 [pdf 943.17KB]
- Self-Service Form - KICA-COG images [pdf 539.52KB]
- Self-Service Form - Kimberley Indigenous Cognitive Assessment - ADL [pdf 148.55KB]
- Self-Service Form - Kimberley Indigenous Cognitive Assessment - Carer [pdf 695.12KB]
- Self-Service Form - Kimberley Indigenous Cognitive Assessment - Cognitive Assessment (KICA-COG) [pdf 895.81KB]
- Downloads - Mini Nutritional Assessment [pdf 81.38KB]
- Downloads - Mini Nutritional Assessment Tool v1.0 [pdf 307.28KB]
- Self-Service Form - Modified Caregiver Strain Index [pdf 217.44KB]
- Template - Notice of Decision - Approval letter - CHSP ONLY [docx 185.89KB]
- Template - Notice of Decision - Non-Approval letter [docx 181.32KB]
- Self-Service Form - Offline Approval Form - February 2017 [docx 113.64KB]
- Self-Service Form - Older Americans Resources and Services (OARS) - Instrumental ADL [pdf 942.75KB]
- Self-Service Form - Oral Health Assessment Tool [pdf 217.37KB]
- Self-Service Form - Residents Verbal Brief Pain Inventory [pdf 247.28KB]
- Self-Service Form - Revised Faecal Incontinence Scale [pdf 216.65KB]
- Self-Service Form - Revised Urinary Incontinence Scale [pdf 148.11KB]
- Self-Service Form - Rowland Universal Dementia Assessment Scale [pdf 981.57KB]
- Template - Second concurrent unit of RCP funding - Approval or Non-approval [docx 80.88KB]
- Downloads - Sensitive Attachment v1.0 [docx 62.40KB]
- Self-Service Form - South Australian Oral Health Referral Pad [pdf 217.59KB]
- Self-Service Form - Standardised Mini-Mental State Examination (SMMSE) [pdf 289.86KB]

From the support plan

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

Plans

[REFER THIS CLIENT FOR ASSESSMENT](#)
[VIEW CLIENT REPORT](#)
[CONTINUE SUPPORT PLAN REVIEW](#)

Client summary

Client details

Support network

Approvals

Plans

Attachments

Services

My Aged Care interactions

Notes

Tasks and Notifications

Residential Funding Classifications

Current Episode

Episode ID: 2-21UJRNQ4

9 July 2025 - Present

SUPPORT PLAN

Assessment history

Comprehensive Assessment 9 July 2025

Screening 9 July 2025



2. The Support Plan and Services page is displayed.

Select the **Decisions** tab, then Select **Upload Non-Approval Letter** from the bottom of the page, underneath **Delegate decisions and comments**.

Support plan and services

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

PRINT COPY OF SUPPORT PLAN

IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment
IAT Outcome: SaH Classification 6

Current care approvals

Delegate decisions and comments

Assessment: Submitted on 5 February 2026

Decisions

No Change to Existing Care Approvals
Priority for this care type: High ?
Approval starts: 5 February 2026
Agreed

Recommend that the client receive Home support

Decision date (Assessment)
5 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

3. Select **Choose File** at the pop up that appears.

Upload non-approval letter

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, .rtf, .txt

Non-approval letter to upload *

Choose file No file chosen

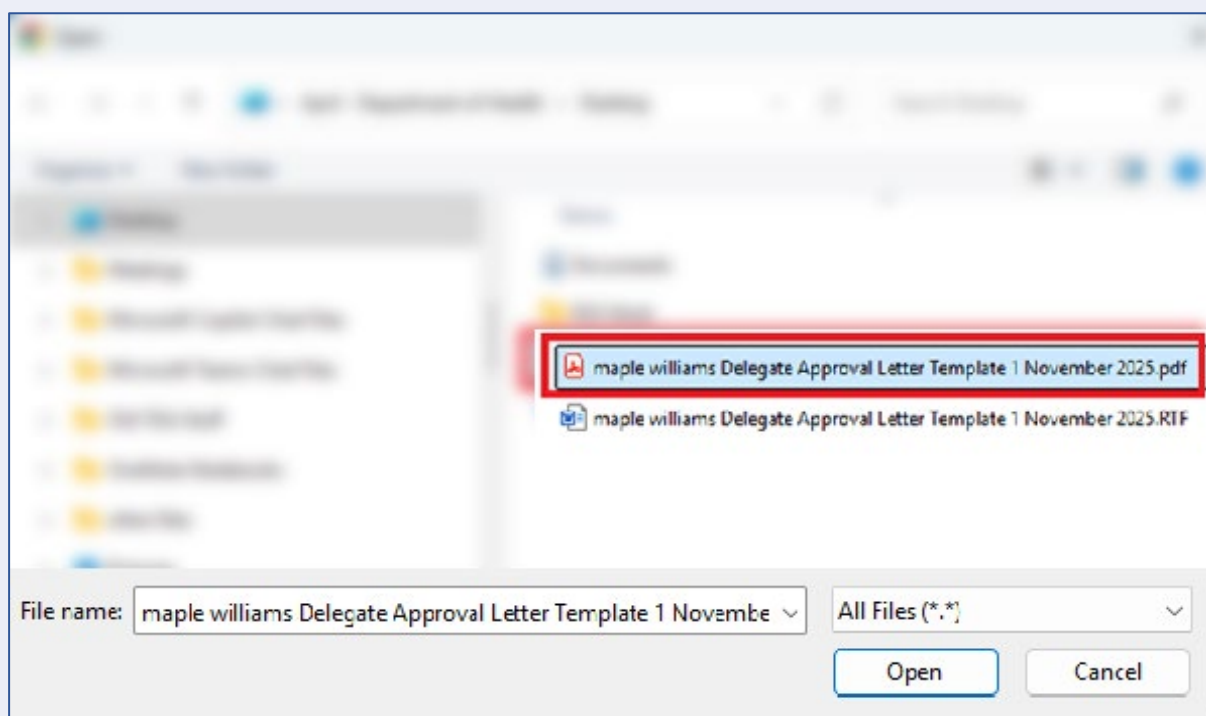
Name of the attachment *
(150 characters)

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
(250 characters)

UPLOAD CANCEL

4. Choose the letter and then select **Open**.

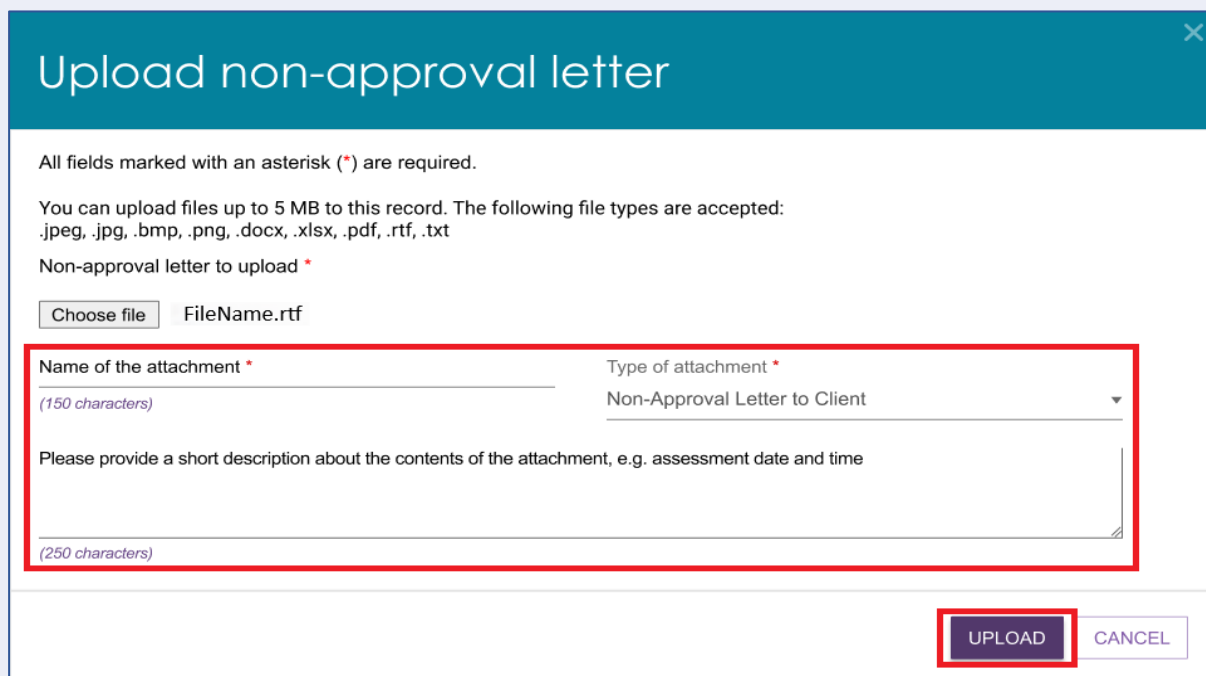


5. The letter name will appear next to the Choose File button.

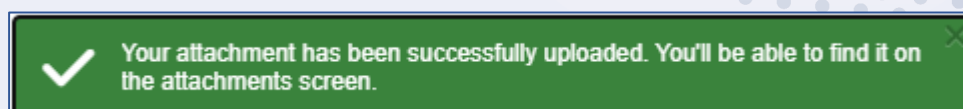
Enter the name of the letter. Ensure the type of attachment is 'Non-Approval Letter to Client'.

Optionally you can provide a short description about the contents of the letter.

Finally, select **UPLOAD**.



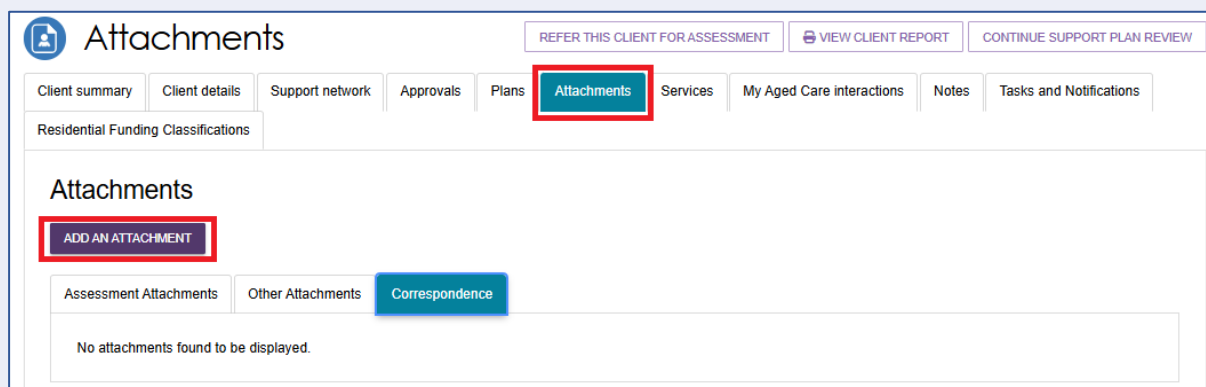
6. A success message appears saying that the attachment is now uploaded onto the Attachments page of the client record.



From the attachments tab

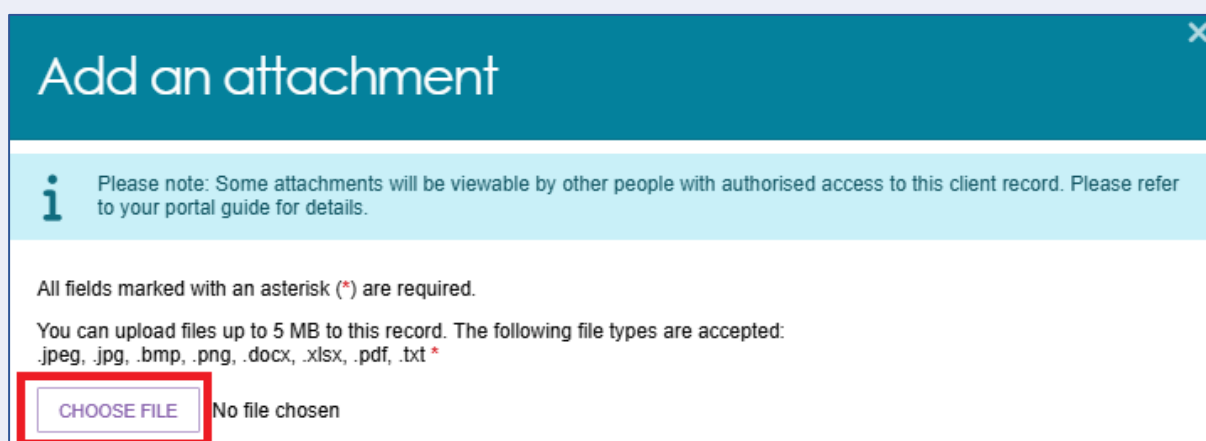
Alternatively, you can upload the letter by using the **Add An Attachment** button in the **Attachments** tab on the client record:

1. Select the client's record and go to the **Attachments** tab. Then, select **Add An Attachment**.



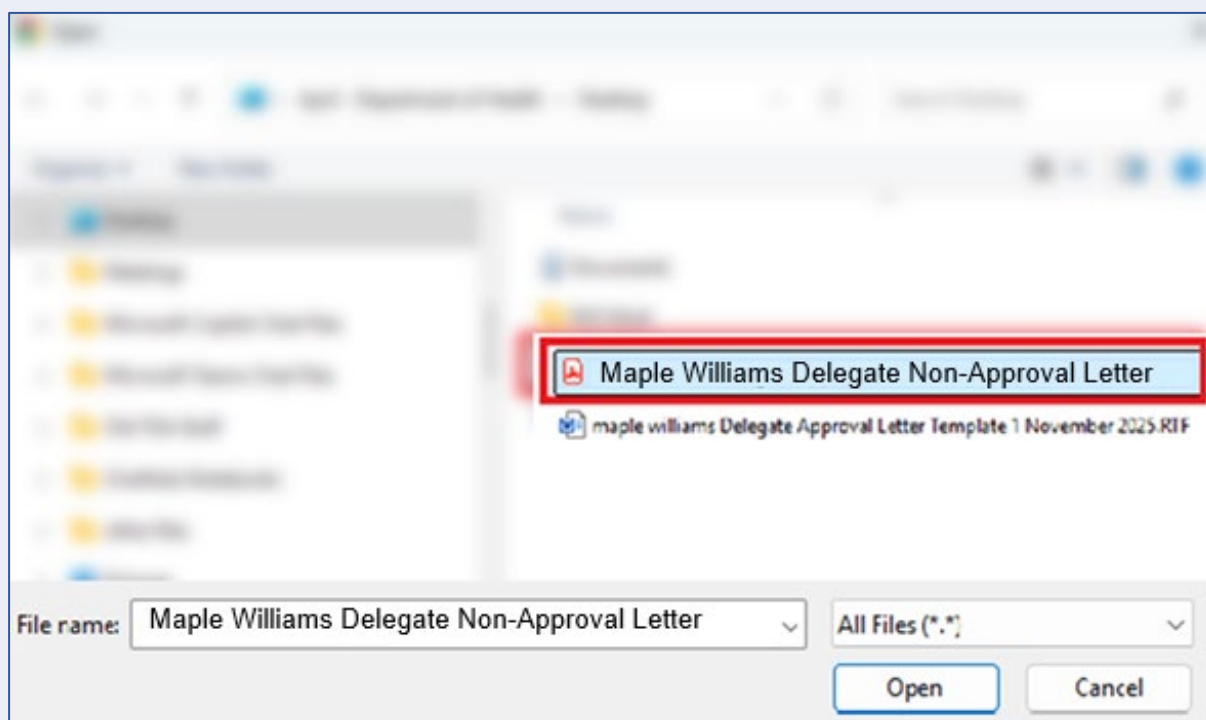
The screenshot shows the 'Attachments' tab selected in a client record. The 'ADD AN ATTACHMENT' button is highlighted with a red box. Below it, there are tabs for 'Assessment Attachments', 'Other Attachments', and 'Correspondence'. The 'Correspondence' tab is currently selected. A message states 'No attachments found to be displayed.'

The Add an attachment pop up appears. Select **Choose File**.



The 'Add an attachment' pop-up window is shown. It includes a warning icon and text: '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.' Below this, it states: '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 *'. The 'CHOOSE FILE' button is highlighted with a red box. To its right, it says 'No file chosen'.

2. Select the approval letter and then select **Open**.



The screenshot shows a file selection dialog box. The file 'Maple Williams Delegate Non-Approval Letter' is selected and highlighted with a red box. Below the file list, the 'File name' field shows 'Maple Williams Delegate Non-Approval Letter' and the file type is set to 'All Files (*.*)'. The 'Open' button is visible at the bottom right.

3. The attachment's name will display next to the Choose File button. Next, enter the Name of the attachment, and select the Type of attachment as **Non-Approval Letter Sent to Client**.
- Optionally you can provide a short description about the contents of the attachment such as assessment date and time.
- Then, select **Upload**.

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

Maple Will...y 2025.pdf

Name of the attachment: *

Maple Williams Delegate Non-Approval Letter 1 July 2025

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

(250 characters)

UPLOAD

CANCEL

4. The letter now appears under the **Assessment Attachments** tab of the **Attachments** page.

Home | Find a client | Maple WILLIAMS

Maple WILLIAMS

Female, 76 years old, 1 February 1950, AC67360693
103 WALLABY QUAD BRISBANE CITY, QLD, 4000

Primary contact: Maple Williams (self)
No support relationships recorded

Attachments

VIEW CLIENT REPORT

Client summary | Client details | Support network | Approvals | Plans | Attachments | Services | My Aged Care interactions | Notes

Tasks and Notifications

Attachments

ADD AN ATTACHMENT

Assessment Attachments | Other Attachments | Correspondence

Non-Approval Letter to Client

Maple Williams Delegate Non-Approval Letter 1 July 2025_260604155006 [pdf 84.10KB]

HIDE FROM VIEW

4 June 2026

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✓ Your attachment has been successfully uploaded. You'll be able to find it on the attachments screen.

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23