



Australian Government



myagedcare

Assessor Portal User Guide 3 - Managing referrals for assessment and Support Plan Reviews

Referrals for assessment from My Aged Care are managed by the person(s) assigned the Team Leader or Triage Delegate role in the My Aged Care assessor portal (assessor portal).

This guide is intended to help staff manage assessment referrals as well as distinguish what functions sit within each role.

Team leaders can accept or reject assessment referrals. After accepting an assessment referral Triage Delegates can assign and complete triage. If the client is found to be ineligible for an assessment the Triage Delegate is required to record and send an Ineligible for Assessment letter to the client.

If the client is eligible for assessment, the Triage Delegates and Team Leaders can assign the referral to an aged care needs assessor (assessor). Team Leaders can reassign or unassign the triaged referrals as required.

Team leaders can also transfer incoming and accepted (but not yet commenced) referrals to other assessment organisations. Before accepting referrals, team leaders can change the priority of assessment referrals.

! On 1 November 2025, the *Aged Care Act 2024* and the Support at Home program came into effect with changes to the functionality of support plans in the IAT.

To ensure the right IAT is used, and triage can continue for priority referrals, any assessments in the following statuses already started prior to 1 November 2025 and in progress on 1 November 2025 must be restarted:

- Triage complete, main assessment not started
- Triage complete, main assessment in progress (includes incomplete support plan)
- Main assessment completed, awaiting delegate decision (comprehensive assessments)

For information on the **Restart Assessment Process**, please refer to *Management of active assessments for 1 November 2025 transition - Standard Operating Procedure and Restarting In Progress Assessments for Support at Home* (instructional video).



Table of contents

Team Leader and Triage Delegate functions.....	3
Viewing incoming assessment referrals and client information	3
Accepting incoming assessment referrals and changing the priority	8
Assigning Triage.....	12
Reassigning Triage to another Triage Delegate.....	16
Decide Not Eligible for assessment before starting triage	20
Unassigning or reassigning an assessment referral.....	22
Completing Triage	24
Triage Pre-population options.....	28
The Triage Questionnaire	29
Triage completed - Not eligible for assessment	34
Viewing triage information.....	35
Generating and Uploading Ineligibility Letters	35
Referring to Urgent Services	38
Converting assessment type.....	40
Assigning an assessment referral to an assessor	41
Rejecting an assessment referral.....	44
Rejecting an assessment referral with the reason of Client deceased	45
Flagging the assessment as End-of-Life Pathway.....	47
Transferring an assessment referral to another outlet or Organisation.....	50
Transferring client records from inactive outlets	54
Residential Funding Referrals	54
Support Plan Reviews	56
Viewing Support Plan Reviews.....	57
Assigning a Support Plan Review.....	59
Transferring a Support Plan Review.....	60
Reassigning a Support Plan Review	61
Cancelling a Support Plan Review	64
Cancelling a Support Plan Review with the reason of Client deceased	65
Change priority for a Support Plan Review	66

Team Leader and Triage Delegate functions

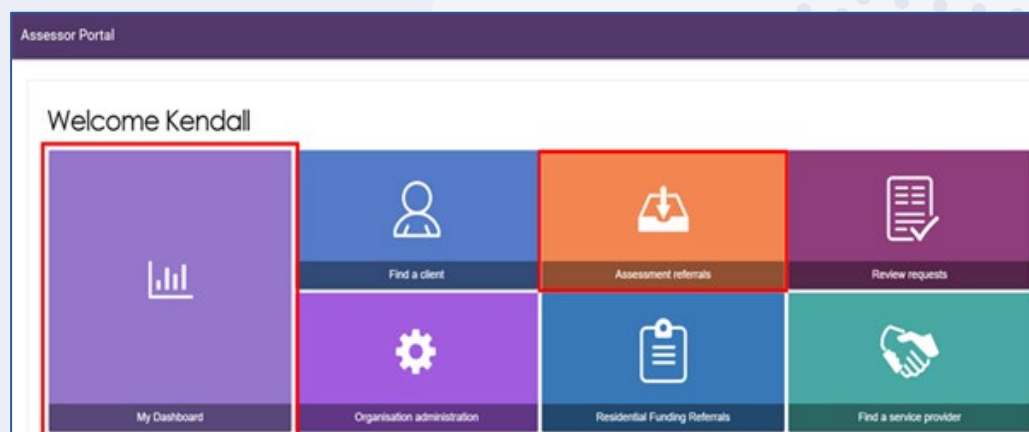
This guide will provide guidance for various functions that both Triage Delegates and Team Leaders can perform, please refer to the table below for specific functions:

Function	Team Leader	Triage Delegate
Viewing incoming, accepted and assigned assessment referrals (including those flagged as Urgent services)	✓	
Viewing triaged assessment referrals	✓	✓
Accept an incoming assessment referral	✓	
Reject or transfer an incoming, accepted or triaged assessment referral	✓	
Assign an accepted assessment referral to myself (if a triage delegate) or another triage delegate for triage		✓
Complete triage (if applicable generate and upload Ineligibility Letter)		✓
Reassign an accepted assessment referral or an assessment while triage is in progress		✓
Refer a client for urgent services before starting triage and once triage is completed		✓
Convert the assessment between Home Support and Comprehensive		✓
Assign an assessment to an assessor once triage is completed	✓	✓
Reassign or unassign triaged assessment referrals.	✓	

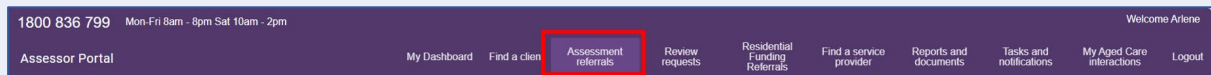
Viewing incoming assessment referrals and client information

Team Leaders can follow the steps below to view incoming referrals for clients assigned to the outlet.

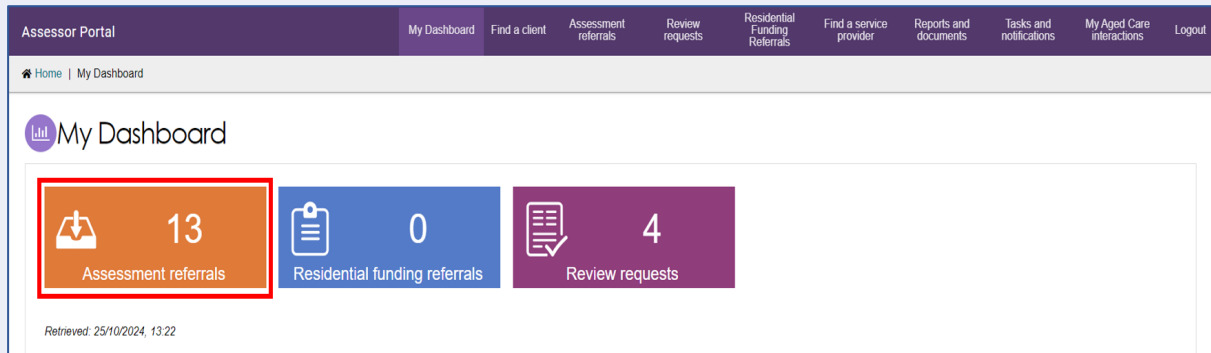
1. Select **My Dashboard** from the home page. You can also select **Assessment referrals** on the homepage.



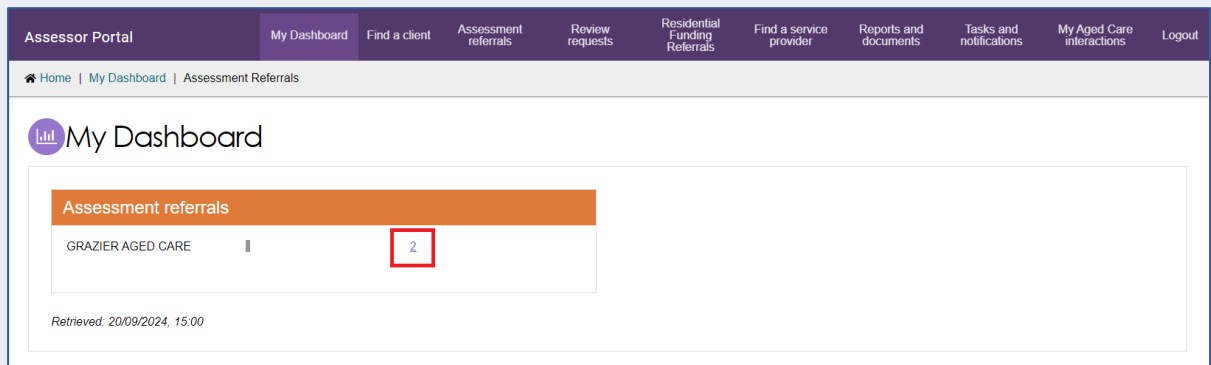
- Alternatively, select **Assessment referrals** from the tool bar at the top right-hand corner of the portal.



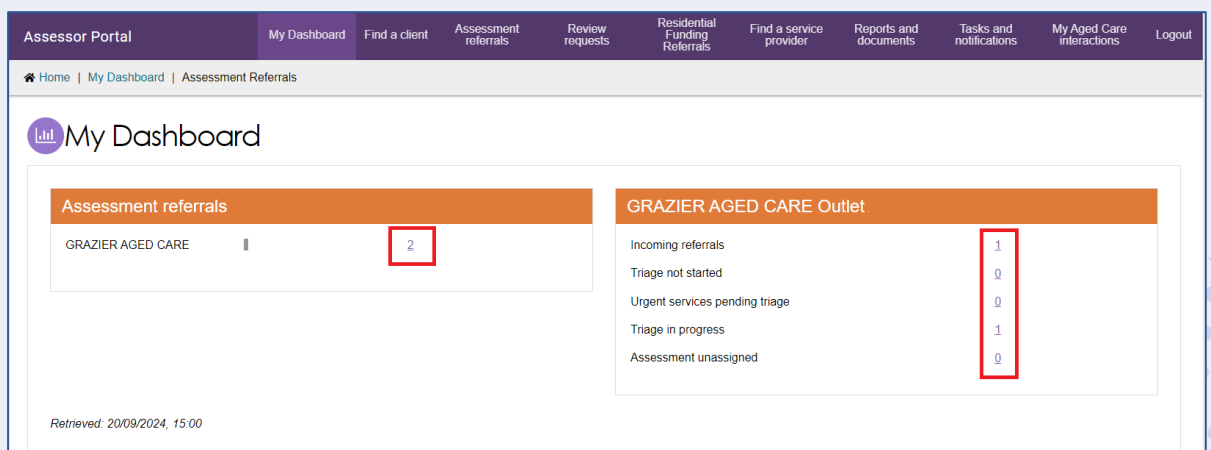
- Select the **Assessment referrals** in the **My Dashboard** page.



- You can view referrals depending on your assigned role. Select the hyperlink corresponding to the referral origin to view more details.



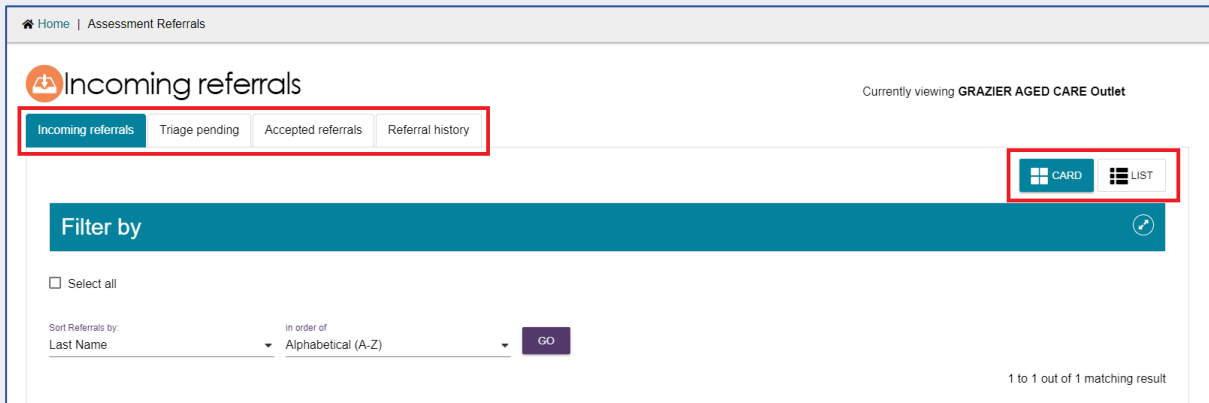
- The **Incoming referrals** and **Unassigned** assessment referrals will be displayed.



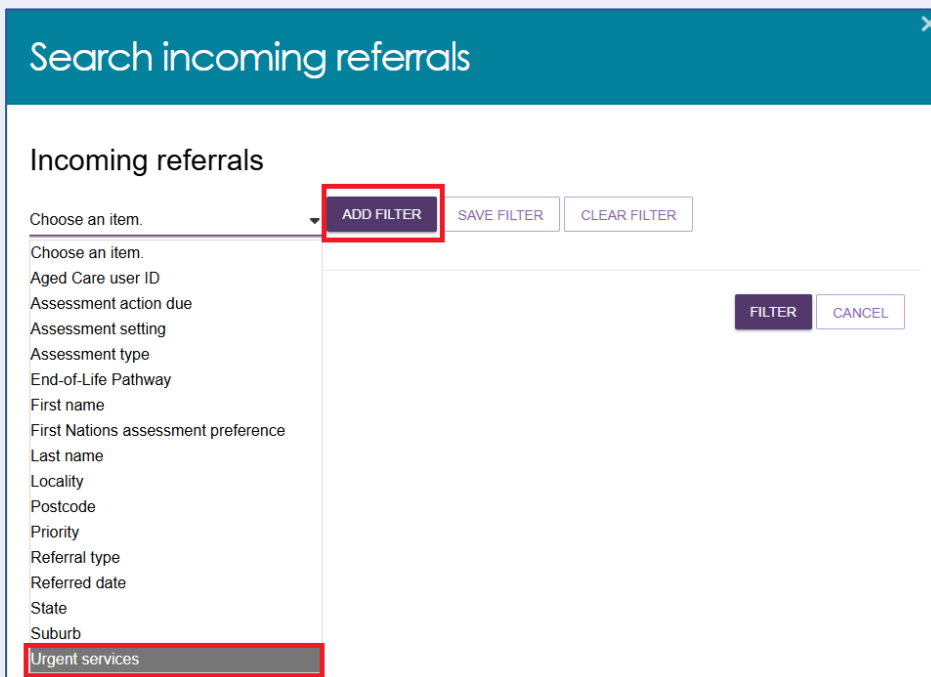
! A warning notification will be displayed if there are referrals that have not been actioned within the priority timeframes.



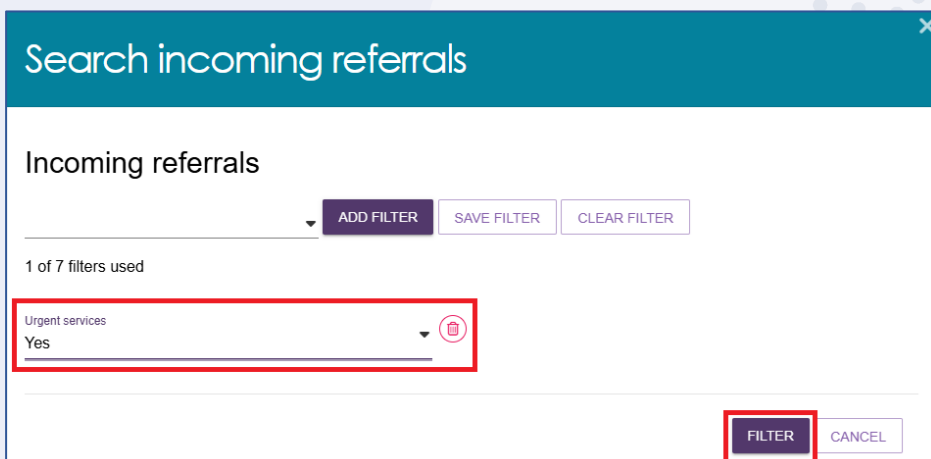
- To view referrals, select the **Incoming referrals** tab under the **Assessment referrals** page. You can select to view assessment referrals in a card or list view by selecting the card or list icon. Your selection will be retained for the next time you log in to the portal.




- Referrals can be filtered or sorted by **Last name**, **First name** or **Aged Care user ID**. You can also search for any referrals that are to urgent services in Advanced Search mode, by selecting **Urgent services** at the drop down and then add the filter.

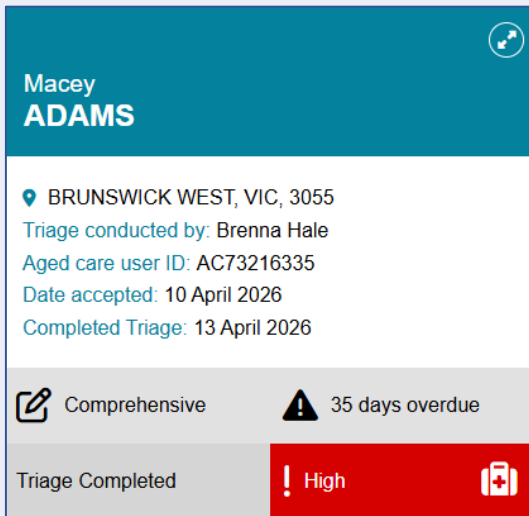


Once the filter is added, select **Yes** from its drop down, then select **Filter** to activate.




The Urgent Services Indicator,  along with the referral's priority will be at the bottom right of the referral card or at the far right of the referral listing.


Card view



Macey ADAMS


BRUNSWICK WEST, VIC, 3055
 Triage conducted by: Brenna Hale
 Aged care user ID: AC73216335
 Date accepted: 10 April 2026
 Completed Triage: 13 April 2026

Comprehensive  35 days overdue

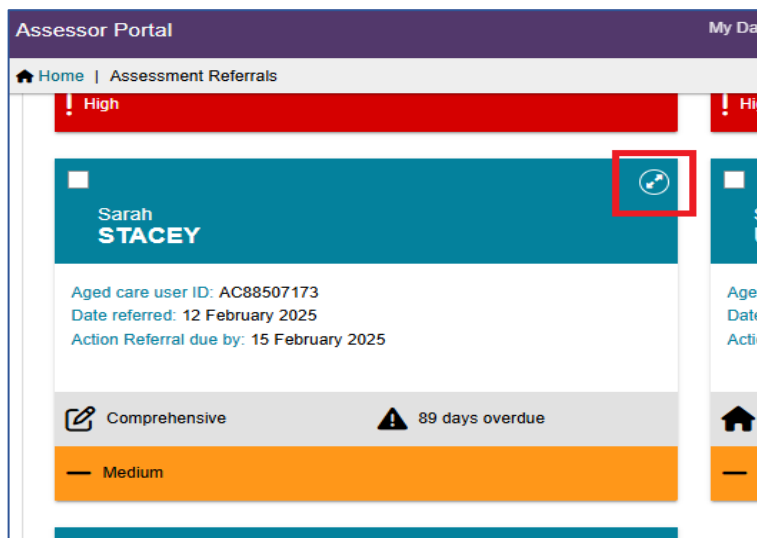
Triage Completed **High** 

List view

	Aged care Name	user ID	Locality	Assessment type	Accepted date	Status	Date due	Assigned to	Priority
	HICKORY Jill	AC73149924	GREENWOOD, WA, 6024	Home Support	24/04/2026	Urgent Services Pending Triage (Completed Triage)	 27/04/2026 (21 days overdue)	Brenna Hale	Low 

- You can view more information on the referred client, including client notes and assessment history by selecting the double arrow (expander) icon  on the top right-hand corner of the client card.

! Upon receiving an urgent request, the Team Leader must select the double arrow icon to expand the referral card, verify whether it relates to **the End-of-Life pathway**, and prioritise it accordingly.




Assessor Portal My Das

Home | Assessment Referrals

High

Sarah STACEY

Aged care user ID: AC88507173
 Date referred: 12 February 2025
 Action Referral due by: 15 February 2025

Comprehensive  89 days overdue

Medium

- A Pop-up screen will appear as below. You can choose to **Accept**, **Reject** or **Transfer** the referral as required.

Sarah STACEY


Aged 75 (29 April 1950), Female, Identifies as: Torres Strait Islander Referred from GRAZIER AGED CARE Outlet ACAT-RAS on 12 February 2025

Preferences
No preference was recorded **Action Referral due by 15 February 2025**

Assessment details
 FNAO-preference Yes **Client story**
No client story was recorded
 Assessment type Comprehensive **Comments**
 Assessment reason Self-Referral
 Assessment setting Hospital

VIEW FULL CLIENT RECORD
VIEW CLIENT REPORT

ACCEPT
REJECT
TRANSFER

- The same referral and client information is available in list view. Select the double arrow (expander) icon  to the left of the client's name to expand the view.






Home | Assessment Referrals

Incoming referrals | Triage pending | Accepted referrals | Referral history

CARD LIST

Filter by

Select all 1 to 33 out of 33 matching results

Name	Aged care user ID	Locality	Assessment type	Date referred	Date due	Priority	Select
 CLARKE Clarke	AC13317250		Home Support	30/04/2025	▲ 03/05/2025 (12 days overdue)	● Low	<input type="checkbox"/>
 SMITH Neave	AC10456002	GOOGONG, NSW, 2620	Home Support	29/04/2025	▲ 02/05/2025 (13 days overdue)	● Low	<input type="checkbox"/>
 UATTEST Sdr	AC21804463		Home Support	29/04/2025	▲ 29/04/2025 (16 days overdue)	● Medium	<input type="checkbox"/>
 COLEK AUTOKatic	AC87729968	ZILLMERE, QLD, 4034	Comprehensive	14/02/2025	▲ 17/02/2025 (87 days overdue)	● High	<input type="checkbox"/>
 STACEY Sarah	AC88597173		Comprehensive	12/02/2025	▲ 15/02/2025 (89 days overdue)	● Medium	<input type="checkbox"/>

Aged 75 (29 April 1950), Female, Identifies as: Torres Strait Islander Referred from GRAZIER AGED CARE Outlet ACAT-RAS on 12 February 2025

Preferences
No preference was recorded **Action Referral due by 15 February 2025**

Assessment details
 FNAO-preference Yes **Client story**
No client story was recorded
 Assessment type Comprehensive **Comments**
 Assessment reason Self-Referral
 Assessment setting Hospital

VIEW FULL CLIENT RECORD
VIEW CLIENT REPORT

ACCEPT
REJECT
TRANSFER

! A banner will be displayed on the referral if additional attachments have been added to the client's record as part of an inbound referral.

! If the client has pending support relationships, a banner will be displayed on the referral. Team Leaders and Triage Delegates are able to confirm pending support relationships for clients. The process is described in [My Aged Care - Assessor Portal User Guide 2 - Registering support people and adding relationships](#).

A banner will be displayed on the referral if it was issued as a **Direct referral**.

Direct referrals have the same key performance indicators as regular referrals. The word 'direct', indicates that the client did not receive a Support Plan Review before being referred.

Dionne LOGUE

DirectReferral
 Requested: 23 September 2024 Requested action date: 26 September 2024

Aged 71 (12 August 1953), Male Referred from Aged Care Gateway on 23 September 2024

Preferences
 No preference was recorded

Assessment details
 Assessment type Comprehensive
 Assessment reason Direct Assessment - Direct referral warning message will be validated in Portal
 Assessment setting Non-Hospital

Support plan review 13 September 2024
Support plan 13 September 2024
Comprehensive Assessment 13 September 2024
Comprehensive Assessment 3 November 2021

Action Referral due by 26 September 2024
Client story
 18/11/2021
 01/11/2021

VIEW ALL 10 CLIENT NOTES

Comments
Cohabitant details

11. If you want to view the information available in the client record you can either go back on your internet browser to return to the **Incoming referrals** page or choose the **Incoming referrals** option from the tool bar.

Home | Assessment Referrals

Incoming referrals

Incoming referrals Triage pending Accepted referrals Referral history

Accepting incoming assessment referrals and changing the priority

Once a Team Leader has viewed the client record, they can accept or reject the referral. Follow the steps below to accept a referral and change the priority of a referral if required.

1. Select **ACCEPT** from the expanded card or list view.

Sarah STACEY

Aged 75 (29 April 1950), Female, Identifies as: Torres Strait Islander Referred from GRAZIER AGED CARE Outlet ACAT-RAS on 12 February 2025

Preferences
 No preference was recorded

Assessment details
 FNAO-preference Yes
 Assessment type Comprehensive
 Assessment reason Self-Referral
 Assessment setting Hospital

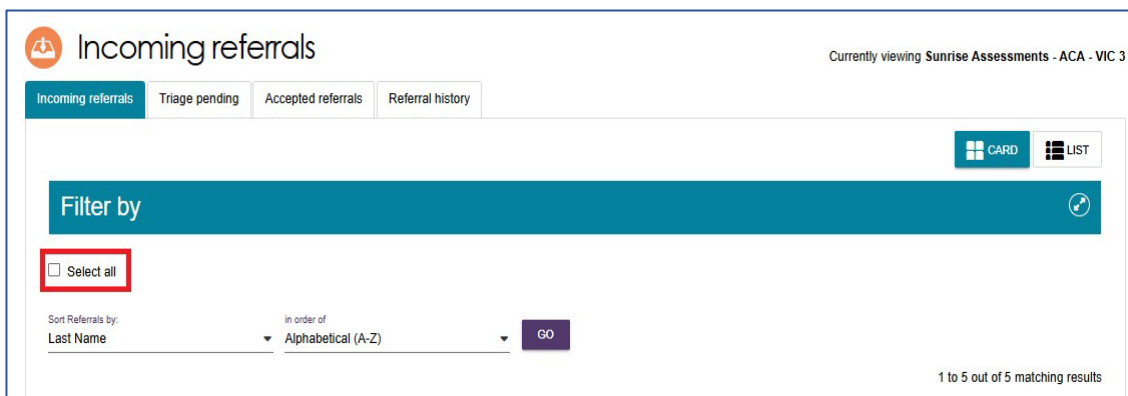
Action Referral due by 15 February 2025
Client story
 No client story was recorded
Comments

VIEW FULL CLIENT RECORD **VIEW CLIENT REPORT**

ACCEPT **REJECT** **TRANSFER**

! Team Leaders can bulk-accept assessment referrals by selecting the tick box next to each client they would like to accept, or by using **SELECT ALL** for all client referrals assigned to their outlet.

The bulk-accepting function defaults the clients' priority to medium. Team leaders will be unable to change the priority when bulk-accepting referrals. Bulk-accepting will default assessment setting to **Non-Hospital**. Team Leaders can then change the setting to **Hospital** as required.



2. Confirm that the priority of the assessment referral is correct and select the **Assessment setting**. To change the assessment priority, choose from the options provided in the drop down.

! When accepting a referral, team leaders can add a free text information into the **Triage category**. Once the referral has been accepted, the information can be used to assist with finding referrals via the search function. This free text option is not to be confused with the triage process that is a required process for accepting referrals.



Team leaders can change the assessment priority as well as the assessment setting for a referral as required.

Accept this referral for sarah stacey

Change assessment priority? ?

Medium

Low

Medium

High

Assessment setting: ?

Hospital

Non-Hospital

ACCEPT CANCEL

! Direct referrals priority default to being high when issued. Team leaders can change the priority of direct referrals when accepting if they determine the client can safely access the assessment at a lower priority level.

- When updating the assessment priority, a relevant reason for changing the priority will need to be selected from the dropdown list with a reason to be provided in the free text box. If the assessment priority is changed, a new priority timeframe will be calculated and applied to the referral.

A reason for changing priority is mandatory if the priority is changed. Users can select from the following options before accepting the referral.

Accept this referral for sarah stacey

Change assessment priority? ?

High

Reason for changing priority ?

Please select

Please select

Changed circumstances

Incorrect priority assigned

Further functional decline

Entered emergency care

End-of-Life Pathway

Other (please specify)

- To change the assessment setting, You can update the assessment setting by selecting **Edit Assessment Setting** in the expanded client card, depending on your role:
 - the team leader on the **accepted referrals** view, or
 - the assessor on the **current work** view.

! The timeframe will continue to be calculated from the date the referral was issued, not the date the priority was changed.

Stella STACEY

Accepted on 12 February 2025
Completed Support Plan due by 27 February 2025

Preferences
No preference was recorded

Assessment details

FNAO-preference	Yes
Assessment type	Comprehensive
Assessment reason	Self-Referral
Assessment setting	Hospital
Assessor	Africa Green
Triage conducted by	Africa Green

Client story
No client story was recorded

Comments

Support plan In Progress

Comprehensive Assessment In Progress

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

- Once the assessment setting is selected. Click **SAVE**. Once the referral has been accepted, the referral will move into the **Triage pending** tab under **Unassigned**.

Stella STACEY

Assessment setting

i If you edit the assessment setting for this client, you must also edit the assessment setting in the IAT.

Assessment setting* ?

Hospital

Non-Hospital

SAVE

CANCEL

[VIEW FULL CLIENT RECORD](#)

[VIEW CLIENT REPORT](#)

! As part of the Single Assessment System Program contract, key performance indicators will consider the setting in which the interaction with the client takes place, specifically a Non-Hospital or Hospital setting.

Team leaders can select the assessment setting while accepting the referral.

Before commencing the assessment, assessors should verify the information entered by the team leader, noting that the assessment setting may have changed since between the time of the acceptance of the referral and when the assessment takes place.

When the assessment is finalised, the **Assessment setting** field on the expanded client card or list view must align with the type of assessment setting recorded within the Intergrated Assessment Tool (IAT). Assessment setting fields can be edited if required, until the Support Plan is completed.

Assigning Triage

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

For further information on the Triage Delegate role, visit [Assessor Portal User Guide 12 - Managing Delegate Roles](#).

Once an assessment referral has been accepted, it will display with a Triage pending status. A Triage Delegate will then need to assign the referral to themselves or to another Triage Delegate for triage.

Once an assessment has been assigned to a Triage Delegate, they can proceed with the triage, reassign the triage to another Triage Delegate or unassign themselves and place the accepted referral back into the triage pending queue.

If the incoming assessment referral is a reassessment that was initiated as part of a Support Plan Review, the assessor or Triage Delegate can start the triage and save triage responses, but only the Triage Delegate can complete the triage. An Information message will be displayed on the client card or listing. For assessors, the **Assign to Triage Delegate** button will also be available.


i The need for this new assessment was identified while conducting a support plan review. An assessor can start triage and enter triage information obtained from the client, but only a Triage Delegate can complete triage.

Age 92 (February 19, 1970), Male Referred from Aged Care Gateway on 1 April 2025
Accepted on 1 May 2025

Preferences
No preference was recorded **First Clinical Intervention due by 5 May 2025**

Assessment details

Assessment type	Home Support	Client story	No client story was recorded
Assessment reason	No assessment reason was recorded	Comments	
Assessment setting	Non-hospital		
Triage category	Data		
Assessor	Alfred Pennyworth		

Latest screening 1 May 2025 

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


[START TRIAGE](#) [ASSIGN TO TRIAGE DELEGATE](#) [REFER URGENT SERVICES](#) [FLAG AS END OF LIFE](#)

1. To access triage pending referrals, select the **Triage pending** tab within the **ASSESSMENT REFERRALS** tile.

! If the Triage delegate has access to multiple outlets, one will need to be selected before continuing with triage.

Assessor Portal Logout

Home | Assessment Referrals

 **Incoming referrals** Currently viewing **ABC Outlet**

[Incoming referrals](#) [Triage pending](#) [Accepted referrals](#) [Referral history](#)

2. Once a referral has been accepted it will be under **Triage pending** and unassigned. You will



have to filter the **Assigned to** drop down and select **unassigned**, then select **FILTER**.


The screenshot shows the 'Triage pending' interface. At the top, there are tabs for 'Incoming referrals', 'Triage pending', 'Accepted referrals', and 'Referral history'. The 'Triage pending' tab is selected. Below the tabs is a 'Filter by' section with input fields for 'Last name' and 'First name', and a dropdown menu for 'Assigned to' which is currently set to 'Unassigned'. There are buttons for 'ADVANCED SEARCH' and 'CLEAR FILTERS'. Below the filter fields, it says 'Assigned to is Assigned to me'. At the bottom, there are 'FILTER' and 'CLEAR' buttons.

At this stage the Triage Delegate can also filter for other criteria including those that are tagged as urgent services in the referral. Select **Urgent services** at the drop down and then add the filter.

The screenshot shows the 'Search triage pending' dialog box. It has a title bar with a close button. Below the title bar, it says 'Triage pending'. There is a dropdown menu for 'Choose an item.' with a list of options: 'Accepted date', 'Aged Care user ID', 'Assessment setting', 'Assessment status', 'Assessment type', 'End-of-Life Pathway', 'First name', 'First Nations assessment preference', 'Last name', 'Priority', and 'Urgent services'. The 'Urgent services' option is highlighted. There are buttons for 'ADD FILTER', 'SAVE FILTER', and 'CLEAR FILTER'. Below the list, there is a 'FILTER' button and a 'CANCEL' button.

Once the filter is added, select **Yes** from its drop down, then select **Filter** to activate.



The screenshot shows the 'Search triage pending' dialog box. It has a title bar with a close button. Below the title bar, it says 'Triage pending'. There is a dropdown menu for 'Choose an item.' with a list of options: 'Accepted date', 'Aged Care user ID', 'Assessment setting', 'Assessment status', 'Assessment type', 'End-of-Life Pathway', 'First name', 'First Nations assessment preference', 'Last name', 'Priority', and 'Urgent services'. The 'Urgent services' option is highlighted. There are buttons for 'ADD FILTER', 'SAVE FILTER', and 'CLEAR FILTER'. Below the list, it says '2 of 7 filters used'. There are two dropdown menus: the first is for 'Urgent services' and the second is for 'Assigned to'. The 'Urgent services' dropdown is set to 'Yes' and the 'Assigned to' dropdown is set to 'Assigned to me'. There are buttons for 'FILTER' and 'CANCEL'.




The Urgent Services Indicator,  along with the referral's priority, will be at the bottom right of the referral card or at the far right of the referral listing.

Card view





Van
VOLTO

Aged care user ID: AC16690976
Date accepted: 24 April 2026
Completed Triage due by: 27 April 2026

 Home Support  22 days overdue

 Urgent Services Pending Triage  Low 

List view

Name	Aged care user ID	Locality	Assessment type	Accepted date	Status	Date due	Priority
 VOLTO Van	AC16690976		Home Support	24/04/2026	Urgent Services (Completed Triage)	 27/04/2026 (22 days overdue)	 Low 

- Expand the client card which you would like to assign triage for. To assign to yourself or another Triage Delegate for action select **ASSIGN**.

Tess MARTINS

Aged 90 (1 July 1934), Female

Referred from GRAZIER AGED CARE Outlet ACAT-RAS on 14 October 2024
Accepted on 14 October 2024

Preferences
No preference was recorded

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

Completed Support Plan due by 23 November 2024

Client story
No client story was recorded

Comments

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

ASSIGN REJECT TRANSFER

! To transfer the referral to another outlet for triage select **TRANSFER**, for further information on transferring a referral, refer to the section [Transferring an assessment referral to another outlet or organisation](#).

To reject the referral, select **REJECT**. For further information on rejecting a referral see the section [Rejecting an assessment referral](#).

- When selecting **ASSIGN** a pop up will appear. From this you will be able to assign the triage decision for the client either to yourself or other Triage Delegates from the selected outlet. Once this has been chosen, select **ASSIGN**.

Assign triage decision for Tess MARTINS

Assign to*

- Me
- Orange SHELL
- Simon FLOWER
- Incy WINCY
- George MATERS
- Harry HELLO
- Maya SINGH

ASSIGN CANCEL

- Once the triage has been assigned, the client card will appear under the **Triage pending** tab., Ensure that the **Assigned** filter is set to **Assigned to me** so that clients assigned to you can be found under the **Triage Not Started** heading.

Home | Assessment Referrals

FILTER CLEAR

Sort Referrals by: Accepted Date in order of: Earliest to Latest GO

Current sort order is Accepted Date

Triage Not Started

Tess MARTINS
GREENWOOD, WA, 6024
Aged care user ID: AC27388446
Date accepted: 14 October 2024
Completed Support Plan: 23 November 2024


Goldwin SMITH
WENTWORTHVILLE, NSW, 2145
Aged care user ID: AC48039697
Date accepted: 12 February 2025
Completed Triage: 15 February 2025

Comprehensive 173 days overdue

Triage Not Started Low

Successfully assigned for triage.

Some assessments have overdue SLAs and need to be scheduled.

- Select the expand card icon  on the client tile. The expanded client card will have the options to:
 - [Start triage](#)
 - Reassign to an [assessor](#) or [triage delegate](#)
 - [Refer to urgent services.](#)
 - [Reject an assessment referral.](#)
 - [Transferring an assessment referral to another outlet or organisation.](#)
 - [Flag as End-of-Life.](#)
 - [‘Decide Not Eligible’ to continue with the assessment.](#)

! A client can also be flagged as End-of-Life if there is a recommendation from a qualified medical professional from this screen. The steps to [complete an End-of-Life process](#) is explained in this document as well as in [Assessor Portal User Guide 6 – Completing an Assessment](#).

Aaron CANTATO

Please confirm that Aaron CANTATO, 15 September 1944, 81 Years, AC12345678 is the person you are conducting this assessment for. If the person details are incorrect, a privacy breach may occur.

Aged 81 (15 September 1944), Male
Referred from Aged Care Gateway on 2 October 2025
Accepted on 4 February 2026

Preferences
No preference was recorded

Assessment details
Assessment type Home Support
Assessment reason

Completed Triage due by 7 February 2026
Client story
02/10/2025

Latest screening 2 October 2025

VIEW ALL 1 CLIENT NOTES

Comments

VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

START TRIAGE REASSIGN **DECIDE NOT ELIGIBLE** REFER URGENT SERVICES REJECT TRANSFER FLAG AS END-OF-LIFE

Reassigning Triage to another Triage Delegate

To reassign triage, select **REASSIGN** from the client's card or listing. Alternative Triage Delegates from the same outlet will be provided as well as the option to **Place back in the delegate queue**. This option will place the client back into a **Triage pending** status and in the queue for allocation.

For an assessor or triage delegate dealing with a reassessment originating from a Support Plan Review, the Reassign function becomes the **ASSIGN TO TRIAGE DELEGATE** button. In this scenario you must assign to another triage delegate from your outlet. There is no option to place the triage decision back in the triage queue.

Reassign (Triage in Progress, or Triage Pending)

James GOWTY

assessment for. If the person details are incorrect, a privacy breach may occur.

Aged 92 (1 July 1933), Male
Referred from Centacare - ACA - Cabool - QLD on 12 May 2026
Accepted on 12 May 2026

Preferences
No preference was recorded

Assessment details
Assessment type Home Support
Assessment reason Self-Referral
Assessor Andy Flower

Completed Triage due by 15 May 2026
Client story
No client story was recorded

Support plan Triage In Progress
Home Support Assessment Triage In Progress

Comments

VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

CONTINUE TRIAGE **REASSIGN**



Current assessments

Currently viewing ABC Outlet

Current assessments

Recent assessments



Filter by



1 to 12 out of 12 matching results

Name	Aged care user ID	Locality	Assessment type	Accepted date	Status	Date due	Priority
GOWTY James	AC28605087	LYNEHAM, ACT, 2602	Home Support	12/05/2026	Triage In Progress (Completed Triage)	15/05/2026 (5 days overdue)	Low



Please confirm that James GOWTY, 1 July 1933, 92 Years, AC28605087 is the person you are conducting this assessment for. If the person details are incorrect, a privacy breach may occur.

Aged 92 (1 July 1933), Male

Referred from Centacare - ACA - Cabool - QLD on 12 May 2026
Accepted on 12 May 2026

Preferences

No preference was recorded

Completed Triage due by 15 May 2026

Assessment details

Assessment type Home Support

Assessment reason Self-Referral

Assessor Andy Flower

Client story

No client story was recorded

Comments

Support plan

Triage In Progress



Home Support Assessment

Triage In Progress

[VIEW FULL CLIENT RECORD](#)

[VIEW CLIENT REPORT](#)

[CONTINUE TRIAGE](#)

[REASSIGN](#)

Re-assign triage decision for James GOWTY

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

Triage decision currently assigned to Andy FLOWER

Re-assign to:*

- Africa GREEN
- Lowell ELLIOTT
- Simon FLOWER
- Place back in triage queue

[RE-ASSIGN](#)

[CANCEL](#)



Assign to Triage Delegate (Reassessment from a Support Plan Review)

1. Select **ASSIGN TO TRIAGE DELEGATE** from the client's card or listing.

Card View

Tommo YINDI

Please confirm that Tommo YINDI, 4 May 1950, 76 Years, AC12345678 is the person you are conducting this assessment for. If the person details are incorrect, a privacy breach may occur.

The need for this new assessment was identified while conducting a support plan review. An assessor can start triage and enter triage information obtained from the client, but only a Triage Delegate can complete triage.

Aged 76 (4 May 1950), Male, Identifies as: Aboriginal

Referred from Centacare - ACA - Cabool - QLD on 20 May 2026
Accepted on 20 May 2026

Preferences
No preference was recorded

Assessment details

FNAO-preference	No
Assessment type	Comprehensive
Assessment reason	Portal Referral
Assessment setting	Non-Hospital
Assessor	Andy Flower

Support plan review 20 May 2026
Support plan 24 April 2026
Comprehensive Assessment 30 April 2026

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

Completed Triage due by 23 May 2026

Client story
No client story was recorded

Comments

VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

START TRIAGE **ASSIGN TO TRIAGE DELEGATE** REFER URGENT SERVICES

List View

Current assessments Currently viewing ABC Outlet

Current assessments Recent assessments

Filter by

1 to 14 out of 14 matching results

Name	Aged care user ID	Locality	Assessment type	Accepted date	Status	Date due	Priority
YINDI Warrin	AC17470675	FITZROY CROSSING, VIA, 6755	Comprehensive	20/05/2026	Triage Not Started (Completed Triage)	23/05/2026 (Due in 3 days)	Medium

The need for this new assessment was identified while conducting a support plan review. An assessor can start triage and enter triage information obtained from the client, but only a Triage Delegate can complete triage.

Aged 76 (4 May 1950), Male, Identifies as: Aboriginal

Referred from Centacare - ACA - Cabool - QLD on 20 May 2026
Accepted on 20 May 2026

Preferences
No preference was recorded

Assessment details

FNAO-preference	No
Assessment type	Comprehensive
Assessment reason	Portal Referral
Assessment setting	Non-Hospital
Assessor	Andy Flower

Support plan review 20 May 2026
Support plan 24 April 2026
Comprehensive Assessment 30 April 2026

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

Completed Triage due by 23 May 2026

Client story
No client story was recorded

Comments

VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

START TRIAGE **ASSIGN TO TRIAGE DELEGATE** REFER URGENT SERVICES

2. The **Assign triage decision** pop up appears. Select the triage delegate, and then select **ASSIGN**.



Assign triage decision for Warrin YINDI ✕

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

Assign to:*

- Zandra MULLINS
- Africa GREEN
- Lowell ELLIOTT
- Simon FLOWER

ASSIGN
CANCEL

3. Once assigned, a green banner appears: 'Triage decision successfully assigned'.



The client's assessment will now display in the new triage delegate's queue.

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

Assessor Portal
Logout

Home | Assessment Referrals

Triage pending

Currently viewing Another Outlet

Incoming referrals
Triage pending
Accepted referrals
Referral history

CARD
LIST

Filter by +

Sort Referrals by: Accepted Date
 in order of: Earliest to Latest
GO

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

Triage Not Started

Warrin YINDI

📍 FITZROY CROSSING, WA, 6765
Aged care user ID: AC17470675
Date accepted: 20 May 2026
Completed Triage: 23 May 2026

📝 Comprehensive
Due in 3 days

! Triage Not Started
— Medium

Decide Not Eligible for assessment before starting triage

! Once the Triage Delegate has [referred urgent services](#) to the client, the Decide Not Eligible function no longer applies.

Triage Delegates can mark a client as 'Ineligible for assessment' without needing to conduct a triage. This functionality is available when a referral is accepted, triage has not started, and there is no urgent service recommended by the Triage Delegate.

This is only applicable for the following circumstances:

- The client is not an Aboriginal or Torres Strait Islander person and is less than 65 years of age
 - The client is an Aboriginal or Torres Strait Islander person and is less than 50 years of age
 - The client is less than 50 years of age and is homeless or at risk of homelessness.
1. From the Organisation Administration tile, go to the Triage Pending tab. Search for the client that you wish to decide not eligible and select **DECIDE NOT ELIGIBLE**.

List View

The screenshot shows the 'Triage pending' interface for a client named TAN Aaron. The interface includes a navigation bar with tabs for 'Incoming referrals', 'Triage pending', 'Accepted referrals', and 'Referral history'. The 'Triage pending' tab is active. A filter bar is visible above a table of results. The table has columns for Name, Aged care user ID, Locality, Assessment type, Accepted date, Status, Date due, Assigned to, and Priority. The client record for TAN Aaron is shown with the following details:

Name	Aged care user ID	Locality	Assessment type	Accepted date	Status	Date due	Assigned to	Priority
TAN Aaron	AC1234	DECEPTION BAY, QLD, 4508	Home Support	04/02/2026	Triage Not Started (Completed Triage)	07/02/2026 (101 days overdue)	Africa Green	Low

Client details for TAN Aaron:

- Aged 81 (15 September 1944), Male
- Referred from Aged Care Gateway on 2 October 2025
- Accepted on 4 February 2026
- Completed Triage due by 7 February 2026
- Client story: 02/10/2025
- Latest screening: 2 October 2025

Buttons available at the bottom of the client record:

- VIEW FULL CLIENT RECORD
- VIEW CLIENT REPORT
- START TRIAGE
- REASSIGN
- DECIDE NOT ELIGIBLE** (highlighted in red)
- REFER URGENT SERVICES
- REJECT
- TRANSFER
- FLAG AS END-OF-LIFE

Aaron TANCOCO

Please confirm that Aaron TANCOCO 15 September 1944, 81 Years, AC39652359 is the person you are conducting this assessment for. If the person details are incorrect, a privacy breach may occur.

Aged 81 (15 September 1944), Male
Referred from Aged Care Gateway on 2 October 2025
Accepted on 4 February 2026

Preferences
No preference was recorded
Completed Triage due by 7 February 2026

Assessment details
Assessment type Home Support
Assessment reason
Client story
02/10/2025

Latest screening 2 October 2025
Comments

VIEW ALL 1 CLIENT NOTES

VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

START TRIAGE REASSIGN **DECIDE NOT ELIGIBLE** REFER URGENT SERVICES REJECT TRANSFER FLAG AS END-OF-LIFE

- The **Decide Not Eligible** pop up appears.
There is a warning message that states you have determined in your capacity as the System Governor that the individual does not meet the eligibility criteria set out under Section 58 of the Aged Care Act (2024).
Select the link **read more +** to expand this message.

Decide not eligible

Warning: You have determined in your capacity as the System Governor that the individual does not meet the eligibility criteria set out under section 58 under the Aged Care Act 2024...
Read more +

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

Please select which of the following reasons apply:*

- Participant is younger than 65 and not First Nations or homeless/at risk of homelessness
- Participant is 49 years old or younger

CONFIRM CANCEL

- Select the reason why the client is not eligible for assessment:
 - Participant is younger than 65 and not First Nations or homeless/at risk of homelessness
 - Participant is 49 years old or youngerThen select **CONFIRM**.

Decide not eligible

You have determined in your capacity as the System Governor that the individual does not meet the eligibility criteria set out under section 58 under the Aged Care Act 2024.

The System Governor must not make an eligibility determination for an aged care needs assessment for an individual unless the System Governor considers that:

(a) the individual:

- (i) is aged 65 or over; or
- (ii) is an Aboriginal or Torres Strait Islander person and is aged at least 50; or
- (iii) is homeless, or at risk of homelessness, and is aged at least 50; and

(b) information of a kind prescribed by the rules has been provided relating to the individual's care needs; and

(c) if the individual is aged less than 65, the individual:

- (i) has elected, in the approved form, to be provided with funded aged care services before the individual turns 65; and
- (ii) has been informed of any other services that may be available to meet the care needs of the individual

[Read less -](#)

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

Please select which of the following reasons apply:*

- Participant is younger than 65 and not First Nations or homeless/at risk of homelessness
- Participant is 49 years old or younger

CONFIRM

CANCEL

Once a Triage Delegate decides that the client is Not Eligible for assessment, they can then [generate and/or upload the corresponding Ineligibility Letter](#).

Unassigning or reassigning an assessment referral

Team Leaders can unassign an assessment referral and reassign the referral to another assessor in the same outlet. There is no limit on the number of times referrals can be unassigned or reassigned.

1. From the **Accepted referrals** tab, access the expanded referral view by selecting the expand icon (double arrow) on the client card.

The screenshot displays the 'Referrals' section of the My Aged Care system. At the top, there are three tabs: 'Triage pending', 'Accepted referrals', and 'Referral history'. The 'Accepted referrals' tab is highlighted with a red box. Below the tabs, there is a dropdown menu for 'in order of' set to 'Comprehensive First' and a 'GO' button. The main area shows a list of client cards. The first card is for Ameya GIBSON, with details including 'WENTWORTHVILLE, NSW, 2145', 'Aged care user ID: AC49525108', and 'Date accepted: 28 January 2025'. The card shows a status of 'Comprehensive' and 'Delegate Decision Complete' with a 'Medium' priority. A double arrow icon is highlighted with a red box. The second card is for Anaya GIBSON, with details including 'HOLT, ACT, 2615'. A double arrow icon is also highlighted with a red box.

2. Select **REASSIGN**. If using list view, select **REASSIGN** from the expanded view.

Anaya GIBSON

Accepted on 23 January 2025

Preferences
No preference was recorded

Assessment details

Assessment type: Comprehensive

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

Assessment setting: Non-Hospital ✎

Assessor: Africa Green

Triage conducted by: Africa Green

Comprehensive Assessment: ● Triage Completed 🗨

Latest screening: 22 January 2025 🗨

Completed Triage due by 26 January 2025

Client story
No client story was recorded

Comments

VIEW FULL CLIENT RECORD

VIEW CLIENT REPORT

REASSIGN

REJECT

TRANSFER

3. Select the assessor that the referral is being assigned to and select **SAVE**. If the referral is going to be unassigned and added back to the queue, select **Unassign and add to the queue**. You can also re-assign to a specific assessor from here.

Re-assign this referral for ANAYA Gibson

Comprehensive Assessment, currently assigned to **Africa Green**.

Assign to: *

- Harry HELLO (0 assessments assigned)
- George MATERS (0 assessments assigned)
- Thomas SILVERSTONE (0 assessments assigned)
- Andy FLOWER (47 assessments assigned)
- Prospect ERFF (109 assessments assigned)
- Unassign and add to the queue

Triage category: _____

SEARCH FOR A SPECIFIC ASSESSOR

SAVE

CANCEL

4. If reassigned, the assessment referral will appear under the relevant assessor in the list of **Accepted referrals**.

Accepted referrals

Currently viewing Northern Sydney LHD ACAT

Incoming referrals | Triage pending | Accepted referrals | Referral history

CARD | LIST

Filter by 🔍

Sort Referrals by: Last Name | in order of: Alphabetical (A-Z) | GO

61 to 72 out of 72 matching results

<div style="background-color: #00728f; color: white; padding: 5px; text-align: center;"> Ellie Winkler </div> <div style="background-color: #00728f; color: white; padding: 5px; text-align: center; font-weight: bold;">Lynelle ANTHONY</div> <p>📍 BELROSE, NSW, 2085 Aged care user ID: AC43887330 Date accepted: 6 March 2023 Delegate Decision: 9 March 2023</p> <div style="display: flex; justify-content: space-between; align-items: center; font-size: x-small;"> 📄 Comprehensive ⚠️ 446 days overdue </div> <div style="display: flex; justify-content: space-between; align-items: center; font-size: x-small;"> ⌚ Awaiting Delegate Decision 📄 Low </div>	<div style="background-color: #00728f; color: white; padding: 5px; text-align: center;"> Lyn ROSEN </div> <div style="background-color: #00728f; color: white; padding: 5px; text-align: center; font-weight: bold;">Lyn ROSEN</div> <p>📍 BELROSE, NSW, 2085 Aged care user ID: AC61517991 Date accepted: 27 February 2023 First Clinical Intervention: 24 March 2023</p> <div style="display: flex; justify-content: space-between; align-items: center; font-size: x-small;"> 📄 Comprehensive ⚠️ 431 days overdue </div> <div style="display: flex; justify-content: space-between; align-items: center; font-size: x-small;"> 📄 Downloaded 📄 Low </div>	<div style="background-color: #00728f; color: white; padding: 5px; text-align: center;"> Catharine TILLEY </div> <div style="background-color: #00728f; color: white; padding: 5px; text-align: center; font-weight: bold;">Catharine TILLEY</div> <p>📍 FRENCHS FOREST, NSW, 2086 Aged care user ID: AC36205854 Date accepted: 15 February 2023 First Clinical Intervention: 12 March 2023</p> <div style="display: flex; justify-content: space-between; align-items: center; font-size: x-small;"> 📄 Comprehensive ⚠️ 443 days overdue </div> <div style="display: flex; justify-content: space-between; align-items: center; font-size: x-small;"> ⌚ Assessment In Progress 📄 Low </div>	<div style="background-color: #00728f; color: white; padding: 5px; text-align: center;"> Farah PERRYMAN </div> <div style="background-color: #00728f; color: white; padding: 5px; text-align: center; font-weight: bold;">Farah PERRYMAN</div> <p>📍 SEAFORTH, NSW, 2092 Aged care user ID: AC88467832 Date accepted: 13 February 2023 First Clinical Intervention: 10 March 2023</p> <div style="display: flex; justify-content: space-between; align-items: center; font-size: x-small;"> 📄 Comprehensive ⚠️ 445 days overdue </div> <div style="display: flex; justify-content: space-between; align-items: center; font-size: x-small;"> 📄 Downloaded 📄 Low </div>
--	---	--	--

- If unassigned, the referral will appear under **Unassigned** in the list of **Accepted Referrals**.

Accepted referrals Currently viewing Northern Sydney LHD ACAT

Incoming referrals | Triage pending | **Accepted referrals** | Referral history

Filter by

Sort Referrals by: Last Name | In order of: Alphabetical (A-Z) | GO

61 to 72 out of 72 matching results

Unassigned

<p>Betty BALL</p> <p>Wesley Hospital KOGARAH, NSW, 2217 Aged care user ID: AC72807274 Date accepted: 21 May 2024 Completed Support Plan: 30 June 2024</p> <p>Comprehensive</p> <p>Triage Completed Low</p>	<p>Cinda MURRY</p> <p>MOSMAN, NSW, 2088 Aged care user ID: AC91555487 Date accepted: 14 December 2022 Completed Support Plan: 23 January 2023</p> <p>Comprehensive 491 days overdue</p> <p>Triage Completed Low</p>	<p>Tommie HEFNER</p> <p>CASTLE HILL, NSW, 2154 Aged care user ID: AC44228971 Date accepted: 15 December 2022 Completed Support Plan: 24 January 2023</p> <p>Comprehensive 490 days overdue</p> <p>Triage Completed Low</p>	<p>Nev'n DATASIX</p> <p>MILSONS POINT, NSW, 2061 Aged care user ID: AC01378429 Date accepted: 22 March 2023</p> <p>Comprehensive</p> <p>Delegate Decision Complete Medium</p>
--	--	---	---

Completing Triage

In the Assessments tile under the Triage pending tab, clients whose triage has not been completed will display under the Triage Not Started heading.

- Expand the client card to view the assessment details such as the Assessment Type, Assessment Reason, Assessment setting, Assessor, Eligibility at Screening and Latest screening (if any).

Sandra SMITH

Please confirm that Sandra SMITH, 14 July 1943, 81 Years, AC68776426 is the person you are conducting this assessment for. If the person details are incorrect, a privacy breach may occur.

Aged 81 (14 July 1943), Female | Referred from Aged Care Gateway on 5 April 2025
Accepted on 5 April 2025

Preferences: No preference was recorded | Completed Triage due by 8 April 2025

Assessment details

Assessment type: Home Support

Assessment reason: the client does not require ongoing support or has ongoing multiple needs that impact their ability to remain living in the community

Eligibility at screening: Unlikely to be eligible

Latest screening: 5 April 2025

Client story: No client story was recorded

Comments

VIEW FULL CLIENT RECORD | VIEW CLIENT REPORT

START TRIAGE | REASSIGN | REFER URGENT SERVICES | REJECT | TRANSFER | FLAG AS END OF LIFE

- Select **START TRIAGE** to begin the triage.

Sandra SMITH



Please confirm that Sandra SMITH, 14 July 1943, 81 Years, AC68776426 is the person you are conducting this assessment for. If the person details are incorrect, a privacy breach may occur.

Aged 81 (14 July 1943), Female

Referred from Aged Care Gateway on 5 April 2025
Accepted on 5 April 2025

Preferences

No preference was recorded

Completed Triage due by 8 April 2025

Assessment details

Assessment type Home Support
Assessment reason the client does not require ongoing support or has ongoing multiple needs that impact their ability to remain living in the community

Client story

No client story was recorded

Comments

Eligibility at screening Unlikely to be eligible

Latest screening 5 April 2025



[VIEW FULL CLIENT RECORD](#)

[VIEW CLIENT REPORT](#)

[START TRIAGE](#)

[REASSIGN](#)

[REFER URGENT SERVICES](#)

[REJECT](#)

[TRANSFER](#)

[FLAG AS END OF LIFE](#)

! The Eligibility at Screening is not a formal eligibility decision under the Aged Care Act 2024. It serves as an indication that the client may not meet the eligibility criteria for an assessment. The final eligibility decision for assessment must be made by the Triage Delegate.

3. Before commencing triage, consent from the client must be received using the consent script. The Consent for Triage script should be read out to the client.

Consent for Triage

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

Information

Informed consent is necessary to meet requirements of both the *Privacy Act 1988* with respect to the collection, use and disclosure of personal and sensitive information and the use and disclosure of protected information under *Chapter 7, Part 2 of the Aged Care Act 2024*.

Prior to starting the triage, the triage delegate must read out the script below to the client and record the client's consent associated with that activity. The script is to be used as a guide to assist the client in providing informed consent and can be tailored to ensure that the information is understood by the client (note that you **must** bring the contents of the privacy notice, including the web address to the client's attention). If the triage delegate significantly deviates from the script, this should be noted in the client's My Aged Care record.

If there is a suggestion that the client lacks capacity, obtain consent from the client's registered supporter, decision-making supporter or guardian in My Aged Care.

For more information, please see the [My Aged Care Assessment Manual](#)

Does client have capacity to give informed consent?

Prior to obtaining consent, the triage delegate must determine whether the client has the capacity to understand and communicate their consent by determining if:

- The client can provide their informed consent independently,
- The client can provide their informed consent with the assistance of their supporter, decision-making supporter, or guardian,
- The client lacks capacity and requires their decision-making supporter or guardian to provide consent on their behalf (this consent cannot be provided by their supporter).

If a supporter, decision-making supporter or guardian (includes other persons in a similar position to a guardian as defined under subsection 28(2) of the Aged Care Act 2024) is required, they must be registered as a such in My Aged Care prior to obtaining the client's consent.

The assessor can also use the 'Notes' section in the client's record to:

- record any detail or the circumstances regarding the handling of a client's personal information); and
- record any instructions relating to the assessor's conversation with the client (or supporter, decision-making supporter or guardian with respect to informed consent).

Script to be read.

In giving your consent for me, to check your eligibility for an aged care assessment you understand that:

- *The assessment organisation will collect information that allows them to assess your eligibility for an aged care assessment.*
- *As part of the assessment, the assessment organisation will collect personal information about you, such as your name and address, and information about your health and care needs.*
- *The information you provide will be recorded in your My Aged Care client record and will be used and disclosed by the assessment organisation, the Department of Health and Aged Care as well as any aged care providers while providing aged care services to you.*



4. Triage Delegate needs to record who the **Consent was obtained from**. Options provided are:

- the client
- the client with support person
- consent was not given
- the supporter guardian.

Consent for Triage

- The client can provide their informed consent independently.
- The client can provide their informed consent with the assistance of their supporter, decision-making supporter, or guardian.
- The client lacks capacity and requires their decision-making supporter or guardian to provide consent on their behalf (this consent cannot be provided by their supporter).

If a supporter, decision-making supporter or guardian (includes other persons in a similar position to a guardian as defined under subsection 28(2) of the Aged Care Act 2024) is required, they must be registered as a such in My Aged Care prior to obtaining the client's consent.

The assessor can also use the 'Notes' section in the client's record to:

- record any detail or the circumstances regarding the handling of a client's personal information); and
- record any instructions relating to the assessor's conversation with the client (or supporter, decision-making supporter or guardian with respect to informed consent).

Script to be read.

In giving your consent for me, to check your eligibility for an aged care assessment you understand that:

- The assessment organisation will collect information that allows them to assess your eligibility for an aged care assessment.
- As part of the assessment, the assessment organisation will collect personal information about you, such as your name and address, and information about your health and care needs.
- The information you provide will be recorded in your My Aged Care client record and will be used and disclosed by the assessment organisation, the Department of Health and Aged Care as well as any aged care providers while providing aged care services to you.
- If you provide the assessment organisation with personal information about other people such as your family or your support person, you confirm that you have obtained the other person's consent and that you have brought the contents of the privacy notice which is set out at [privacy notice web address](#) to their attention. Information about these other people will be included in your My Aged Care client record and will be handled in the same way as your own personal information - being for the purpose of providing aged care services to you.
- The information you provide may also be recorded in the assessment organisation's IT systems and will be used and disclosed by the assessment organisation for the purpose of determining your eligibility for and priority of an aged care assessment.
- The assessment organisation may share your personal information with other organisations to manage the support you need, for example, the Department of Health and Aged Care, and aged care or health providers.
- As we go through the aged care eligibility check process, please tell me if you do not want any of your information to be recorded. We can discuss how to manage this further.
- You can change your mind and withdraw your consent to participate in the aged care eligibility check process at any time. However, this will mean the assessment organisation cannot check your eligibility for aged care services and cannot conduct your aged care assessment. You will need to arrange your own aged care services.
- You can view the privacy notice which is set out at [privacy notice web address](#) as well as the My Aged Care privacy policy on the My Aged Care website at [myagedcare.gov.au](#) for more information on how we handle your personal information.
- Do we have your consent to assess the eligibility of Sandra SMITH for an aged care assessment?

Consent Obtained From *

Select one

- Select one
- The client
- The client with support person
- Consent was not given
- The supporter guardian

5. Once the selection is made, select **CONTINUE** to progress.

Script to be read.

In giving your consent for me, to check your eligibility for an aged care assessment you understand that:

- The assessment organisation will collect information that allows them to assess your eligibility for an aged care assessment.
- As part of the assessment, the assessment organisation will collect personal information about you, such as your name and address, and information about your health and care needs.
- The information you provide will be recorded in your My Aged Care client record and will be used and disclosed by the assessment organisation, the Department of Health and Aged Care as well as any aged care providers while providing aged care services to you.
- If you provide the assessment organisation with personal information about other people such as your family or your support person, you confirm that you have obtained the other person's consent and that you have brought the contents of the privacy notice which is set out at [privacy notice web address](#) to their attention. Information about these other people will be included in your My Aged Care client record and will be handled in the same way as your own personal information - being for the purpose of providing aged care services to you.
- The information you provide may also be recorded in the assessment organisation's IT systems and will be used and disclosed by the assessment organisation for the purpose of determining your eligibility for and priority of an aged care assessment.
- The assessment organisation may share your personal information with other organisations to manage the support you need, for example, the Department of Health and Aged Care, and aged care or health providers.
- As we go through the aged care eligibility check process, please tell me if you do not want any of your information to be recorded. We can discuss how to manage this further.
- You can change your mind and withdraw your consent to participate in the aged care eligibility check process at any time. However, this will mean the assessment organisation cannot check your eligibility for aged care services and cannot conduct your aged care assessment. You will need to arrange your own aged care services.
- You can view the privacy notice which is set out at [privacy notice web address](#) as well as the My Aged Care privacy policy on the My Aged Care website at [myagedcare.gov.au](#) for more information on how we handle your personal information.
- Do we have your consent to assess the eligibility of Sandra SMITH for an aged care assessment?

Consent Obtained From *

The client

CONTINUE CANCEL

6. If the client or their supporters choose to not give consent, the triage process must end. The Triage Delegate is required to provide a reason for refusal. Options provided are:
- the assessment is no longer required
 - client's support person is not available
 - client does not have the capacity to understand and communicate consent
 - client's supporter withdraws consent
 - client's supporter not available to give consent
 - other reasons that can be specified further in a free text format.

! The use of the **Other, please specify** value should be limited to rare and unusual situations that are not captured by existing values.

Consent for Triage

- record any detail of the circumstances regarding the handling of a client's personal information); and
- record any instructions relating to the assessor's conversation with the client (or supporter, decision-making supporter or guardian with respect to informed consent).

Script to be read.
In giving your consent for me, to check your eligibility for an aged care assessment you understand that:

- The assessment organisation will collect information that allows them to assess your eligibility for an aged care assessment.
- As part of the assessment, the assessment organisation will collect personal information about you, such as your name and address, and information about your health and care needs.
- The information you provide will be recorded in your My Aged Care client record and will be used and disclosed by the assessment organisation, the Department of Health and Aged Care as well as any aged care providers while providing aged care services to you.
- If you provide the assessment organisation with personal information about other people such as your family or your support person, you confirm that you have obtained the other person's consent and that you have brought the contents of the privacy notice which is set out at [privacy notice web address](#) to their attention. Information about these other people will be included in your My Aged Care client record and will be handled in the same way as your own personal information - being for the purpose of providing aged care services to you.
- The information you provide may also be recorded in the assessment organisation's IT systems and will be used and disclosed by the assessment organisation for the purpose of determining your eligibility for and priority of an aged care assessment.
- The assessment organisation may share your personal information with other organisations to manage the support you need, for example, the Department of Health and Aged Care, and aged care or health providers.
- As we go through the aged care eligibility check process, please tell me if you do not want any of your information to be recorded. We can discuss how to manage this further.
- You can change your mind and withdraw your consent to participate in the aged care eligibility check process at any time. However, this will mean the assessment organisation cannot check your eligibility for aged care services and cannot conduct your aged care assessment. You will need to arrange your own aged care services.
- You can view the privacy notice which is set out at [privacy notice web address](#) as well as the My Aged Care privacy policy on the My Aged Care website at [myagedcare.gov.au](#) for more information on how we handle your personal information.
- Do we have your consent to assess the eligibility of Sandra SMITH for an aged care assessment?

Consent Obtained From *
 Consent was not given

Please select a reason for not providing the consent *
 Select one

- Select one
- Assessment no longer required
- Support person not available
- Client unable to consent
- Other, please specify
- Revoked by supporter
- Supporter not available

7. Once a reason for not providing consent is given, select **SAVE AND CLOSE**.

Consent Obtained From *
 Consent was not given

Please select a reason for not providing the consent *
 Revoked by supporter

! Please be advised that without capturing the consent, you cannot proceed any further with the Triage. If sure, then select 'Save and Close'. This will reject the referral.

SAVE AND CLOSE CANCEL

Triage Pre-population options

Triage Delegates will have the option to pre-populate responses from the client's previously finalised assessment, if available.

1. Select the **CONFIRM PRE-POPULATION** button to pre-populate the relevant previous screening/assessment. Select the **BLANK TRIAGE** button to begin the triage without pre-populated responses. Selecting the **CANCEL** button will navigate you back to the expanded view.

In exceptional cases when the client's previous referral was rejected after triage was completed, you will only be able to complete the triage with the pre-populated rejected referral.

Pre-populate or start a blank triage

By selecting 'Confirm Pre-population' the new Triage will be pre-populated with answers from the Screening completed on 5 April 2025.
Please select 'Blank Triage' if you want to start the new triage with no pre-population. Note that you will not be able to select to pre-populate the new triage after a blank triage has been created.

CONFIRM PRE-POPULATION **BLANK TRIAGE** **CANCEL**

2. Confirm the **Demographic details** of the client. Once confirmed, select **SAVE AND CONTINUE TO TRIAGE**.

Demographic details

All fields marked with an asterisk (*) are required.
Please check the following information for this client before starting the assessment. All fields must be completed before the assessment can begin.

Remote Assessment ?

Personal details & Identification

First name * Sandra	Address: 1 MACLEOD Street BAIRNSDALE VIC 3875 Contact details: 0402256369 Medicare number: To change the above details, view the full client record.
Middle name	
Last name * Smith	

Background

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

Date of birth
14/07/1943

or

Estimated age
81

Gender *

SAVE AND CONTINUE TO TRIAGE **CANCEL**



- During screening, if the client identifies as an Aboriginal or Torres Strait Islander, they can request to have their assessment completed by a First Nations Assessment Organisation.

Demographic details

Country of birth *
Australia

Ethnicity *
Australian

Does the client identify as an Aboriginal or Torres Strait Islander?
Indigenous origin:
 No - Neither
 Yes - Aboriginal
 Yes - Torres Strait Islander
 Yes - Both
 Not stated/inadequately desc

Does the client prefer a First Nations Assessment Organisation for their assessment?
Yes

Preferred language *
English

Marital status *
Never married

Accommodation type *
PR Client Owns/Purchasing

SAVE AND CONTINUE TO TRIAGE CANCEL

The Triage Questionnaire

- Once the triage pre-population is completed, you will be directed to the Triage screen. Follow the prompts for the pre-populated or blank triage. All mandatory questions must be answered before completing triage.

There will be different mandatory questions under the following circumstances:

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

Ms Sandra SMITH

Female, 81 years old, 14 July 1943, AC68776426
1 MACLEOD STREET BAIRNSDALE, VIC, 3875

Save Triage

Triage

Triage

Clear Page Information

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

Date of Triage ⓘ 15/05/2025 🗑️

Registration screen information collected from *

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



2. You must respond to the question **What type of needs assessor is recommended for client assessment**. The options available are **Clinical**, **Non-clinical** and **not eligible for assessment**. The option that is selected will display in the portal showing:

- comprehensive (clinical) assessment required
- home support (non-clinical) assessment required
- not eligible for an aged care assessment (refer to the [Not eligible for assessment](#) section for further information).

Advice for assessment

What type of assessor is recommended for client assessment? *

Clinical	Non-Clinical	Not eligible for assessment
----------	--------------	-----------------------------

3. If the answer to the last question is **Clinical** or **Non-Clinical**, you must then record if the client is requiring an urgent assessment. The options that are available are:

- High urgency – Client is in Hospital
- High urgency – Client is at immediate risk of harm or in a crisis situation (e.g. client carer incapacitated)
- High urgency – Client from a vulnerable cohort and/or has complexity
- Medium urgency – Client at home but needing services
- Urgent assessment not required.

If the client requires an urgent assessment and is on the End-of-Life pathway, you must select a High Urgency option.

Require an urgent assessment? *

High urgency - Client is in hospital	High urgency - Client is at immediate risk of self harm or in a crisis situation (e.g. client carer incapacitated)	High urgency - Client from a vulnerable cohort and/or has complexity	Medium urgency - Client at home but needing services	Urgent assessment not required
--------------------------------------	--	--	--	--------------------------------

4. Select the **Priority of assessment**. It may be pre-filled from the referral record.

You should review the Assessment Priority and change it if client circumstances have recently changed. The priority should align with the previous question on the urgency of the assessment. If changing, then you must select a reason and enter a reason description.

Priority of assessment * ⓘ

Low	Medium	High
-----	--------	------

The below image shows when the Priority of assessment changes from the original pre-filled value (for example from Low or High to Medium), the **Reason for changing priority** question appears.

The Reason for changing priority options available are:

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

If you select **Other (please specify)**, the Reason description text box appears and you must enter the description.

Priority of assessment* i

Low Medium High

Reason for changing priority*

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

Reason description:*

Enter a description if Other was selected

41 / 255

! For End-of-Life Pathway, the priority of assessment during triage must be set to High. If the pre-filled value was not High, you must change it to **High**, then select **End-of-Life Pathway** as the Reason for changing priority.

Priority of assessment* i

Low Medium **High**

Reason for changing priority*

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

5. Specify if the client requires short-term urgent services, delivered via the [Commonwealth Home Support Program \(CHSP\)](#).

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

Yes No

6. To save the recorded information but not complete the triage, select the **SAVE TRIAGE** button. This button is displayed on top of the Navigation pane as well as at the bottom of the page.

Top of the navigation pane

Home | Assessment Referrals | Triage

Mr Johnny YOUNG

Male, 63 years old, 1 July 1962, AC50721166
1 LOBELIA STREET GREENWOOD, WA, 6024
Prefers to speak Italian

Save Triage

Triage

Triage

Clear Page Information

Bottom of the page

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

Yes No

Outcome/advice for assessment notes

0 / 500

SAVE TRIAGE CANCEL TRIAGE - NO FURTHER ACTION REQUIRED

7. If the triage needs to be cancelled, select the **CANCEL TRIAGE – NO FURTHER ACTION REQUIRED** button located at the bottom of the triage page. Provide a reason for ending the triage and a comment at the pop up that appears. A list of options will be provided under **Reason for ending the triage**. Once the cancellation has been confirmed the referral will be rejected and you will be navigated back to the client summary page.

Cancel triage - no further action required

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

Reason for ending the triage *

Comment: *

0 / 200

CANCEL TRIAGE TAKE ME BACK TO THE TRIAGE

8. To complete the triage, select the **COMPLETE TRIAGE** button at the bottom of the triage screen. Note that the **COMPLETE TRIAGE** button will not appear until all mandatory questions have been answered in the triage.

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

Yes No

Outcome/advice for assessment notes

0 / 500

COMPLETE TRIAGE SAVE TRIAGE CANCEL TRIAGE - NO FURTHER ACTION REQUIRED

Once **COMPLETE TRIAGE** has been selected, a pop up will confirm that you would like to complete the triage. Select **COMPLETE TRIAGE** to continue.

Complete Triage

Once you select 'Complete Triage', you cannot modify any of the responses in this questionnaire. If sure, then please select 'Complete Triage', otherwise select 'Take me back to Triage'.

COMPLETE TRIAGE TAKE ME BACK TO TRIAGE

Once the client's triage has been completed, the referral for that client will remain on the **Triage pending** screen, under the **Triage Completed** heading.

Home | Assessment Referrals

Triage pending

Currently viewing ABC Outlet

Incoming referrals Triage pending Accepted referrals Referral history

CARD LIST

Filter by

Sort Referrals by: Accepted Date in order of: Earliest to Latest GO

Current sort order is Accepted Date 1 to 2 out of 2 matching results

Triage Completed

Tom TANCOCO

DECEPTION BAY, QLD, 4508
Triage conducted by: Africa Green
Aged care user ID: AC12345678
Date accepted: 4 February 2026
Completed Triage: 7 February 2026

Home Support 102 days overdue

Triage Completed Medium

9. The Triage Delegate will be able to expand the client card or listing, and view the following information and buttons:

- view full client record
- view client report.
- assign to assessor
- refer urgent services
- convert to home support assessment or comprehensive assessment
- reject
- transfer
- flag as End-of-Life.

Once the Complete triage action is completed, the above information will load as a pop-up screen automatically.

Tom TANCOCO

Assessment type Home Support 02/10/2025

Assessment reason

VIEW ALL 1 CLIENT NOTES

Comments

Triage conducted by Africa Green

Support plan ● Triage Completed

Home Support Assessment ● Triage Completed

Latest screening 2 October 2025

VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

ASSIGN TO ASSESSOR REFER URGENT SERVICES CONVERT TO COMPREHENSIVE ASSESSMENT

REJECT TRANSFER FLAG AS END-OF-LIFE

Triage completed - Not eligible for assessment

During the Triage process, if a client is deemed as **Not eligible for assessment**, the Triage Delegate must notify the client with a formal decision letter.

Advice for assessment

What type of assessor is recommended for client assessment? *

Clinical Non-Clinical **Not eligible for assessment**

Upon completion of the triage where a client is found to be **not eligible for assessment**, the triage delegate will be taken to the **ATTACHMENTS** tab on the Client record screen with the following message (as shown in the example) displayed at the bottom of the page.

You have found the applicant ineligible for an assessment.

Next steps are:

- 1) Generate the Ineligibility Letter using the GENERATE INELIGIBILITY LETTER button.
- 2) Change the generated letter as required to reflect the reason why you found them ineligible.
- 3) Send the changed letter to the applicant and upload it to their client record using the UPLOAD INELIGIBILITY LETTER button.

Refer to the [Generating and Uploading Ineligibility Letters](#) section on these next steps.

Viewing triage information

Triage Delegates and Team Leaders can view the client's triage information from the client's summary page. This is done by selecting the magnifying glass icon next to **Home Support Assessment or Comprehensive Assessment**.

Jay BIZZLE

Aged 97 (12 April 1928), Male

Referred from Aged Care Gateway on 28 April 2025
Accepted on 29 April 2025

Preferences
No preference was recorded

Completed Triage due by 2 May 2025

Assessment details

Assessment type Home Support

Assessment reason the client does not require ongoing support or has ongoing multiple needs that impact their ability to remain living in the community

Client story
No client story was recorded

Triage conducted by Brenna Hale

Comments

Support plan ● Triage Completed

Home Support Assessment ● Triage Completed

Latest screening 28 April 2025

VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

ASSIGN TO ASSESSOR REFER URGENT SERVICES CONVERT TO COMPREHENSIVE ASSESSMENT REJECT TRANSFER

FLAG AS END OF LIFE

Generating and Uploading Ineligibility Letters

Once a Triage Delegate decides that the client is Not Eligible for assessment (either before or during triage), they can then generate and/or upload the corresponding Ineligibility Letter. This is done in the Attachments tab of the client record.

A message also shows that 'you have found the application ineligible for an assessment. Next steps are:

1. Generate the ineligibility letter using the GENERATE INELIGIBILITY LETTER button
2. Change the generated letter as required to reflect the reason why you found [the client] ineligible
3. Send the changed letter to the applicant and upload it to their client record using the UPLOAD INELIGIBILITY LETTER button.'

You have found the applicant ineligible for an assessment.

Next steps are:

- 1) Generate the Ineligibility Letter using the GENERATE INELIGIBILITY LETTER button.
- 2) Change the generated letter as required to reflect the reason why you found them ineligible.
- 3) Send the changed letter to the applicant and upload it to their client record using the UPLOAD INELIGIBILITY LETTER button.

1. To generate the ineligibility letter for the client, on the client's expanded card or list view, and select the **VIEW FULL CLIENT RECORD** button.

Accepted on 5 April 2025

Completed Triage due by 8 April 2025

Preferences
No preference was recorded

Assessment details

Assessment type Home Support

Assessment reason the client does not require ongoing support or has ongoing multiple needs that impact their ability to remain living in the community

Eligibility at screening **Unlikely to be eligible**

Triage conducted by Obadiah Edmondson

Support plan ● Triage Completed

Home Support Assessment ● Triage Completed

Latest screening 5 April 2025

Client story
No client story was recorded

Comments

VIEW FULL CLIENT RECORD **VIEW CLIENT REPORT**

ASSIGN TO ASSESSOR **REFER URGENT SERVICES** **CONVERT TO COMPREHENSIVE ASSESSMENT** **REJECT** **TRANSFER**

FLAG AS END OF LIFE

2. Select the **GENERATE INELIGIBILITY LETTER** button.

Mr Goldwin SMITH
Male, 64 years old, 12 February 1961, AC48039697
Lot Number 8 PAGE STREET NORFOLK ISLAND, NSW, 2899

Attachments

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

Attachments

ADD AN ATTACHMENT **GENERATE INELIGIBILITY LETTER** **UPLOAD INELIGIBILITY LETTER**

Assessment Attachments Other Attachments Correspondence

3. This will redirect you to the My Reports section, which will contain the Ineligible for Assessment Letter template. Wait until the Status is **Ready** and select **View**. This will allow you to download the letter.

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

Assessor Portal My Dashboard Find a client Assessment referrals Review requests Organisation administration Residential Funding Referrals Find a service provider Reports and documents Tasks and notifications My Aged Care interactions Logout

Reports

My Reports

Name	Requested Date	Status
Andy Gerber Ineligible for Assessment Letter Template	19 May 2026	Ready - View

[CLOSE](#)

Update and change the generated letter template as required to reflect the reason why you have found the client ineligible during triage. Once you have completed the changes, save the letter template as a PDF or DOCX format. Select **CLOSE** to return to the client's profile.

! The system supports a maximum file size of 5MB, and does not accept Rich Text Format (RTF) files. Convert your files to PDF or DOCX formats before uploading.

- Upload the updated Ineligible for Assessment Letter via the **UPLOAD INELIGIBILITY LETTER** button.

Attachments

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

Attachments

[ADD AN ATTACHMENT](#)
[GENERATE INELIGIBILITY LETTER](#)
[UPLOAD INELIGIBILITY LETTER](#)

[Assessment Attachments](#)
[Other Attachments](#)
[Correspondence](#)

No attachments found to be displayed.

- The Upload ineligibility letter pop up will appear. Select **CHOOSE FILE** and select the file. Once selected, select **UPLOAD**.

Upload ineligibility letter

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

Ineligibility letter to upload *

[CHOOSE FILE](#) No file chosen

[UPLOAD](#) [CANCEL](#)

- If the document is successfully uploaded, you will receive a green banner indicating the attachment has been successfully uploaded. The letter will appear in the **Assessment Attachments** tab.

Attachments

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

ADD AN ATTACHMENT GENERATE INELIGIBILITY LETTER UPLOAD INELIGIBILITY LETTER

Assessment Attachments Other Attachments Correspondence

Ineligible for Assessment Ltr 19 May 2026

Andy Gerber Ineligible for Assessment Letter Template 19 May 2026_260519222405.pdf [pdf 564.69KB] HIDE FROM VIEW

Accessibility Privacy Disclaimer Terms of use Cop Copyright © Commonwealth of Australia ABN 83 605 Your attachment has been successfully uploaded. Australia Government Department of Health and Aged Care myagedcare

Referring to Urgent Services

Triage Delegates can refer a client for short-term urgent services (delivered via the [Commonwealth Home Support Program \(CHSP\)](#) only) once an assessment referral has been accepted. This can occur before or after triage.

! Once the Triage Delegate has referred urgent services to the client, the [Decide Not Eligible](#) function no longer applies.

1. To refer urgent services before conducting triage, in the **Triage pending** tab, the Triage Delegate will select the card for the client they are referring to for urgent services. Then select the button **REFER URGENT SERVICES**.

Jay BIZZLE

Aged 97 (12 April 1928), Male Referred from Aged Care Gateway on 28 April 2025
Accepted on 29 April 2025

Preferences
No preference was recorded

Assessment details
Assessment type Home Support
Assessment reason the client does not require ongoing support or has ongoing multiple needs that impact their ability to remain living in the community

Triage conducted by Brenna Hale

Support plan ● Triage Completed
Home Support Assessment ● Triage Completed
Latest screening 28 April 2025

Completed Triage due by 2 May 2025
Client story
No client story was recorded
Comments

VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

ASSIGN TO ASSESSOR **REFER URGENT SERVICES** CONVERT TO COMPREHENSIVE ASSESSMENT REJECT TRANSFER

FLAG AS END OF LIFE

2. A pop up appears – ‘You should only provide urgent services if you have determined that the older person meets the eligibility criteria. If you continue, the DECIDE NOT ELIGIBLE button will no longer be available’. Select **CONFIRM** to continue.

Confirm refer urgent services ✕

You should only provide urgent services if you have determined that the older person meets the eligibility criteria. If you continue the DECIDE NOT ELIGIBLE button will no longer be available.

CONFIRM
CANCEL

3. The Triage Delegate will then be navigated to the **Goals & recommendations** tab under **Support Plan and services**.

Select **ADD A SERVICE RECOMMENDATION** to enter the urgent service required. For more information refer to [My Aged Care – Assessor Portal User Guide 7 – Completing a support plan and support plan review | Australian Government Department of Health, Disability and Ageing](#)

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

Client concerns and goals

ADD AREA OF CONCERN

No client concerns or goals.

Other recommendations

ADD A GENERAL RECOMMENDATION

ADD A SERVICE RECOMMENDATION

There are no service recommendations for this client

CANCEL PENDING ASSESSMENT

RETURN TO CLIENT

4. When a client has been referred for urgent services, **Urgent Services Pending Triage** will be shown on the client's card or listing.

Van VOLTO
✕

Aged care user ID: AC16690976

Date accepted: 24 April 2026

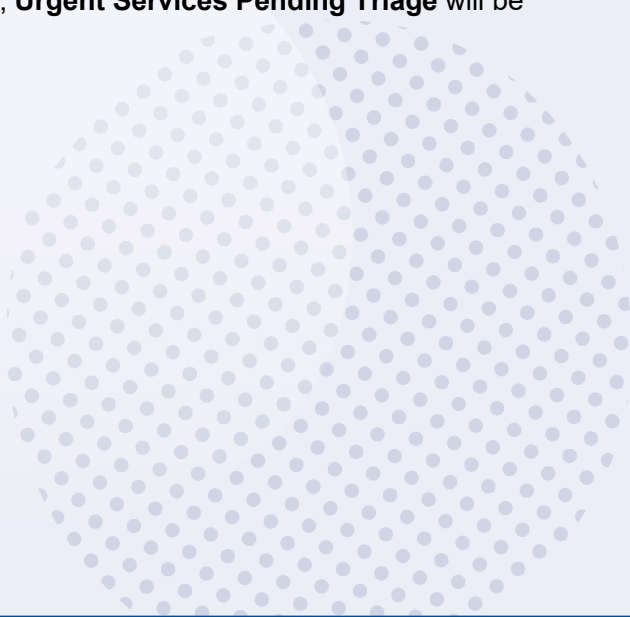
Completed Triage due by: 27 April 2026

Home Support

22 days overdue

Urgent Services Pending Triage

▼
Low



Converting assessment type

Triage Delegates can convert a client's assessment from Comprehensive to Home Support, or Home Support to Comprehensive.

1. Once triage has been completed and based on their clinical judgement, the Triage Delegate can convert the assessment by selecting the **CONVERT TO HOME SUPPORT ASSESSMENT** or **CONVERT TO COMPREHENSIVE ASSESSMENT**.

Convert to Comprehensive Assessment

Jay BIZZLE

Aged 97 (12 April 1928), Male

Referred from Aged Care Gateway on 28 April 2025
Accepted on 29 April 2025

Preferences
No preference was recorded

Assessment details

Assessment type Home Support

Assessment reason the client does not require ongoing support or has ongoing multiple needs that impact their ability to remain living in the community

Triage conducted by Brenna Hale

Support plan ● Triage Completed

Home Support Assessment ● Triage Completed

Latest screening 28 April 2025

Completed Triage due by 2 May 2025

Client story
No client story was recorded

Comments

VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

ASSIGN TO ASSESSOR REFER URGENT SERVICES **CONVERT TO COMPREHENSIVE ASSESSMENT** REJECT TRANSFER

FLAG AS END OF LIFE

Convert to Home Support Assessment

Ei MACLEAN

Assessment type Comprehensive

Assessment reason Direct Assessment - Needs respite care

Assessment setting Non-Hospital

Triage conducted by Africa Green

Support plan ● Triage Completed

Comprehensive Assessment ● Triage Completed

Latest screening 4 September 2023

13/09/2023

VIEW ALL 4 CLIENT NOTES

Comments

Cohabitant details
[Jesusa MACLEAN](#)

VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

ASSIGN TO ASSESSOR REFER URGENT SERVICES **CONVERT TO HOME SUPPORT ASSESSMENT** REJECT TRANSFER

FLAG AS END-OF-LIFE

2. When converting from a Comprehensive Assessment to a Home Support Assessment, Triage Delegate will need to enter the **Reason for change** as being **Low level care needs**.
Add a reason or comments. Then, select **YES, CONVERT ASSESSMENT**.

Convert to home support assessment

You are about to convert the assessment type from Comprehensive to Home Support for Kim JOLLEY.

Assessments should only be converted if the client's needs can be met by the level of care that can be provided through Home Support assessments (e.g. home support services).

Are you sure you want to proceed?

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

Reason for change *
Low level care needs

Reason or comments: *
0 / 255

YES, CONVERT ASSESSMENT NO, CANCEL

- When converting from a Home Support Assessment to a Comprehensive Assessment, Triage Delegates will need to enter the **Reason for change** as being **High level care needs**.
Add a reason or comments. Then, select **YES, CONVERT ASSESSMENT**.

Convert to comprehensive assessment

You are about to convert the assessment type from Home Support to Comprehensive for Paris SILVER.

Assessments should only be converted if the client's needs exceed the level of care that can be provided through Home Support assessments (i.e., Home support services).

Are you sure you want to proceed?

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

Reason for change *
High level care needs

Reason or comments: *
0 / 255

YES, CONVERT ASSESSMENT NO, CANCEL

Assigning an assessment referral to an assessor

Before a Triage Delegate assigns an assessment referral to an assessor, triage must be completed.

- Referrals that can be assigned are located in the **Triage pending** tab, under the **Triage Completed** heading. Expand the client card for the referral you wish to assign, then select **ASSIGN TO ASSESSOR**.

Triage pending Currently viewing ABC Outlet

Incoming referrals | **Triage pending** | Accepted referrals | Referral history

CARD LIST

Filter by

Sort Referrals by: **Assessment Status** in order of **In Order** **GO**

Current sort order is Assessment Status 1 to 3 out of 3 matching results

Triage Completed

Ei MACLEAN

DECEPTION BAY, QLD, 4508
Triage conducted by: Africa Green
Aged care user ID: AC35638949
Date accepted: 1 May 2026
Completed Triage: 4 May 2026

Comprehensive **16 days overdue**

Triage Completed **High**

Jodi PEREIRA

NORTH LAKES, QLD, 4509
Aged care user ID: AC26262030
Date accepted: 1 May 2026
Completed Triage: 4 May 2026

Comprehensive **16 days overdue**

Triage Completed **High**

Ei MACLEAN

Assessment reason Direct Assessment - Needs respite care

Assessment setting Non-Hospital

Triage conducted by Africa Green

Support plan ● Triage Completed **13/09/2023**

Comprehensive Assessment ● Triage Completed

Latest screening 4 September 2023

[VIEW ALL 4 CLIENT NOTES](#)

Comments

Cohabitant details
[Jesusa MACLEAN](#)

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

ASSIGN TO ASSESSOR [REFER URGENT SERVICES](#) [CONVERT TO HOME SUPPORT ASSESSMENT](#)

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

- The Triage Delegate can **Change assessment priority** before assigning the referral. Respond **Yes** or **No** to the question **Assign now**, and then choose the assessor.

You can also **SEARCH FOR A SPECIFIC ASSESSOR**. To proceed select **ASSIGN**.

If you do not wish to assign now, this referral will remain under the **Triage pending** tab, under the **Triage Completed** heading.

Assign this referral for Eli Maclean

Change assessment priority? ?

High

Comprehensive Assessment, currently unassigned.

Assign now? Yes No

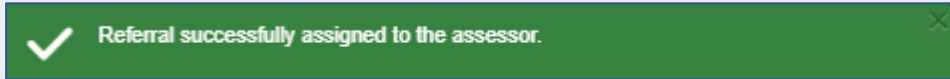
Assign to: *

- Hui ZAMUDIO (0 assessments assigned)
- Prospect FREE (8 assessments assigned)
- Flint POTTS (8 assessments assigned)
- Andy FLOWER (13 assessments assigned)
- Africa GREEN (42 assessments assigned)

SEARCH FOR A SPECIFIC ASSESSOR

ASSIGN CANCEL

3. If successful, a green banner appears: 'Referral successfully assigned to the assessor'.



The assessment referral will appear in the **Accepted referrals** list, under the name of the assessor the referral was assigned to. The referral will also appear in the assigned assessor's **Current assessments** list for action.

Accepted referrals

Currently viewing ABC Outlet

Incoming referrals | Triage pending | **Accepted referrals** | Referral history

Filter by Expand filter

Sort Referrals by: Priority in order of High to Low GO

Current sort order is Priority 1 to 20 out of 107 matching results

<p>Andy Flower</p> <p>Eli MACLEAN</p> <p>DECEPTION BAY, QLD, 4508 Aged care user ID: AC35638949 Date accepted: 1 May 2026 Completed Triage: 4 May 2026</p> <p>Comprehensive ⚠️ 16 days overdue</p> <p>Triage Completed ! High</p>	<p>Brian NIGHT</p> <p>GOOGONG, NSW, 2620 Aged care user ID: AC17504689 Date accepted: 15 March 2026 Completed Triage: 18 March 2026</p> <p>Comprehensive ⚠️ 63 days overdue</p> <p>Triage Completed ! High</p>	<p>Murrey MARKINS</p> <p>GREENWOOD, WA, 6024 Aged care user ID: AC73275851 Date accepted: 28 April 2026 Completed Support Plan: 18 May 2026</p> <p>Comprehensive ⚠️ 2 days overdue</p> <p>Assessment In Progress — Medium</p>
---	---	--

Rejecting an assessment referral

If an outlet is unable to accept an assessment referral and cannot transfer it, a Team Leader can reject the referral. Referrals may also be rejected after acceptance, but only before the assessment has commenced.

1. Select **REJECT** on the expanded card view or list view of the referral information.

The screenshot displays the 'Eliot HAMMONS' client record interface. The top header is teal with the name 'Eliot HAMMONS' and a close button. Below the header, the interface is divided into two columns. The left column contains 'Assessment details' with fields for 'Assessment type' (Comprehensive), 'Assessment reason' (24/09/2025), 'Assessment setting' (Non-Hospital), 'Assessor' (Phylliss Cupp), 'Triage conducted by' (Laticia Kasper), 'Comprehensive Assessment' (Triage Completed), and 'Latest screening' (13 March 2025). The right column contains 'Completed Triage due by 22 August 2025', 'Client story' (24/09/2025), and 'Comments'. At the bottom, there are buttons for 'VIEW FULL CLIENT RECORD', 'VIEW CLIENT REPORT', 'REASSIGN', 'REJECT' (highlighted with a red box), and 'TRANSFER'.

2. Select a reason for rejecting the assessment referral. Optionally you can enter the rejection reason. If you selected 'Other', then the rejection reason is mandatory.

Then, select **REJECT**. The rejected referral will automatically be sent to My Aged Care to action.

! The use of the 'Other' value when rejecting referrals should be limited to rare and unusual situations that are not captured by existing values. If an existing value primarily captures the nature of the rejection reason, please utilise that option. The free text field will be available for further information for any rejection reason selected.

! An older Aboriginal and/or Torres Strait Islander person should not be rejected based on a client's preference (e.g. under the reason "Client prefers an FNAO") unless it is a last resort. A transfer prior to the assessment is preferable to a rejection. For more information please refer to the [My Aged Care Assessment Manual](#).

Reject this referral for Eliot Hammons

Select a reason:*

- Client/family/rep unavailable
- Duplicate Client Record
- Interpreter not available
- Unable to contact client
- Outside assessment region
- Assessment no longer required
- Care approval meets needs
- Client medically unstable
- Client age - alternate options
- Client does not consent
- Client deceased
- Client prefers an FNAO
- Clinical staff not available
- Hospital assessment required
- Client prefer later assessment
- Other

Rejection reason:

0 / 500

REJECT

CANCEL

Rejecting an assessment referral with the reason of Client deceased

! Rejecting an assessment referral with the reason of **Client deceased** will change the client's status to **Deceased** and make the client record read-only. Any unaccepted service referrals will be recalled, services in place will be ceased, assessments will be cancelled and the client's access to the client portal will be revoked. My Aged Care will not send correspondence to the client or their supporters after the status is changed to **Deceased**.

1. If a client is deceased during an assessment referral period, team leaders will need to provide the following information:
 - who, when and how you were informed that this person is deceased e.g. "Mrs Smith rang to inform us that Mr Smith has passed away on Saturday"
 - date of death (if known)
 - attachments (e.g. death certificate, hospital discharge documents).

Reject this referral for Eliot Hammons

- Interpreter not available
- Unable to contact client
- Outside assessment region
- Assessment no longer required
- Care approval meets needs
- Client medically unstable
- Client age - alternate options
- Client does not consent
- Client deceased
- Client prefers an FNAO
- Clinical staff not available
- Hospital assessment required
- Client prefer later assessment
- Other

You are about to notify the department that Eliot Hammons has passed away. Their record will become read only. You will still be able to finalise outstanding assessments and support plan reviews, and add notes and attachments.

Please supply the following information:

Who, when and how were you informed that this person is deceased? * ?

0 / 500

Date of death
(if known)



dd/mm/yyyy

Add Attachments

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
(if available)

Choose a file...

Rejection reason:

0 / 500

REJECT

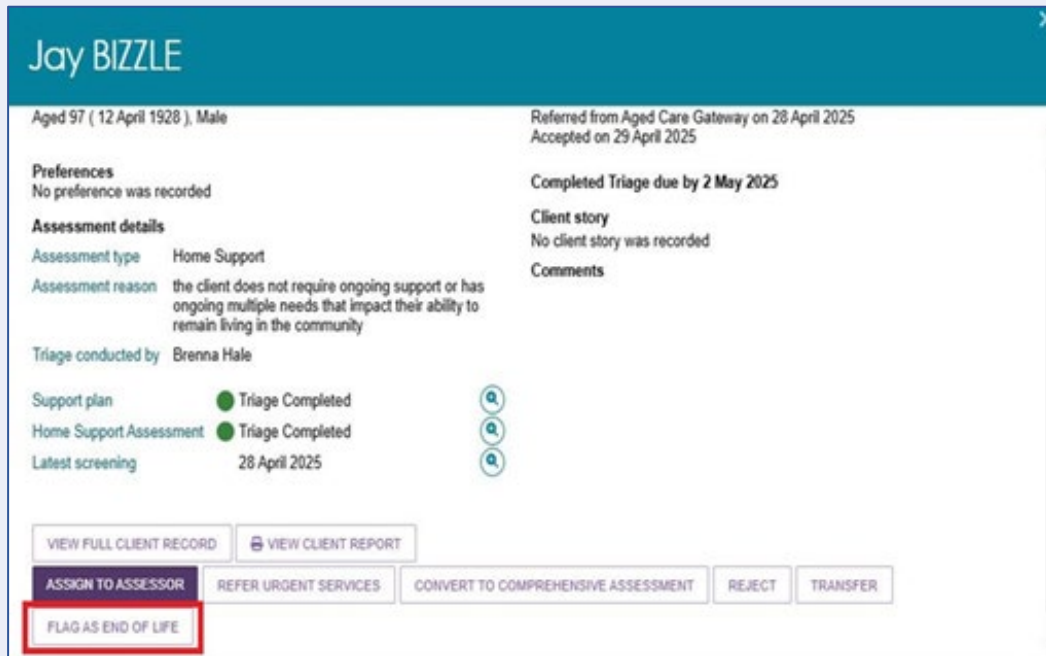
CANCEL

2. When a client is marked as deceased, if they have an in-progress assessment or have commenced services, a notification will be sent to the associated assessor in the assessor portal advising the assessor to close or finalise the in-progress tasks.

Flagging the assessment as End-of-Life Pathway

If the client has provided the Triage Delegate with a completed End-of-Life Pathway Form, they can flag the assessment referral to be considered for the End-of-Life Pathway, which is given a high priority. This process can be completed before and after triage is completed.

1. Select the **Flag as End-of-Life** button in the client's card or list view.

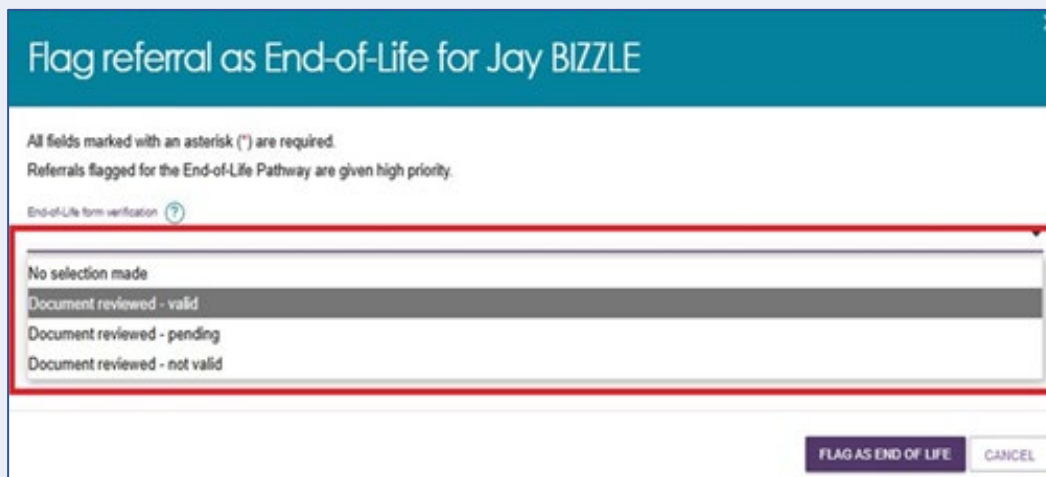


The screenshot shows a client card for Jay BIZZLE. The card includes the following information:

- Client Name:** Jay BIZZLE
- Age and Gender:** Aged 97 (12 April 1928), Male
- Referral Date:** Referred from Aged Care Gateway on 28 April 2025, Accepted on 29 April 2025
- Preferences:** No preference was recorded
- Assessment details:**
 - Assessment type:** Home Support
 - Assessment reason:** the client does not require ongoing support or has ongoing multiple needs that impact their ability to remain living in the community
 - Triage conducted by:** Brenna Hale
- Support plan:** Triage Completed
- Home Support Assessment:** Triage Completed
- Latest screening:** 28 April 2025
- Completed Triage due by:** 2 May 2025
- Client story:** No client story was recorded
- Comments:**

At the bottom of the card, there are several action buttons: VIEW FULL CLIENT RECORD, VIEW CLIENT REPORT, ASSIGN TO ASSESSOR, REFER URGENT SERVICES, CONVERT TO COMPREHENSIVE ASSESSMENT, REJECT, and TRANSFER. The **FLAG AS END OF LIFE** button is highlighted with a red box.

2. Review the provided documents according to the rules of the [My Aged Care Assessment Manual](#). Carefully examine the End-of-Life Pathway Form and any supporting documentation submitted by the client. Select the most appropriate value for verifying the End-of-Life Pathway Form and supporting documents.



The screenshot shows a dialog box titled "Flag referral as End-of-Life for Jay BIZZLE". It contains the following information:

- Instructions:** All fields marked with an asterisk (*) are required. Referrals flagged for the End-of-Life Pathway are given high priority.
- End-of-Life form verification:** A dropdown menu is shown with the following options: No selection made, Document reviewed - valid, Document reviewed - pending, and Document reviewed - not valid. The "Document reviewed - valid" option is selected.
- Buttons:** FLAG AS END OF LIFE and CANCEL.

! It is crucial to review and upload the End-of-Life Pathway Form and any supporting documentation to ensure the client meets the eligibility requirements under the End-of-Life Pathway. If the documentation is incomplete or missing, select **Document reviewed – pending**.

3. Complete the Details field by entering the necessary details, then select the **UPLOAD ATTACHMENT** button to attach the form.

4. Select the **CHOOSE FILE** button to select the form from your device.

Fill in the Attachment type, Attachment name, and Attachment description fields, and then select the **UPLOAD** button to upload the form.

5. A confirmation screen will appear. Review or delete the attachment or details if necessary, and then select the **FLAG AS END-OF-LIFE** button to complete the process.

Flag referral as End-of-Life for Jay BIZZLE

All fields marked with an asterisk (*) are required.
Referrals flagged for the End-of-Life Pathway are given high priority.

End-of-Life form verification ?
Document reviewed - valid

Details
Dr. Hannibal, Jay Bizzle's GP, has completed the End-of-Life form and provided the supporting documentation, which I have reviewed. Jay Bizzle provided the form at Triage.

171 / 255

UPLOAD ATTACHMENT

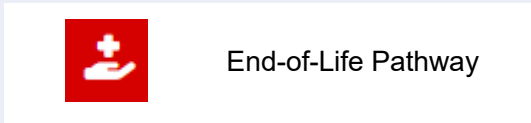
Upload up to 5 files (10MB max total, 5MB max per attachment) in .jpeg, .jpg, .bmp, .png, .docx, .xlsx, .pdf, or .txt format. *

Jay Bizzle End of Life Form 30 April 2025 (End of Life Form) [pdf 122.09KB] 2 May 2025

Form completed by Dr Hannibal for Jay Bizzle.

FLAG AS END OF LIFE
CANCEL

6. Once completed you will receive a green confirmation banner at the bottom of the screen, and the assessment referral card will show the End-of-Life Pathway symbol.



Triage Completed

Jay
BIZZLE

Triage conducted by: Brenna Hale
Aged care user ID: AC87611323
Date accepted: 29 April 2025
Completed Triage: 2 May 2025

Home Support Due today

Triage Completed High

You have successfully flagged Jay BIZZLE for the End-of-Life Pathway.

Transferring an assessment referral to another outlet or Organisation

Only incoming, accepted or triaged referrals may be transferred to another outlet or organisation. A referral can only be transferred to another organisation or outlet once.

Follow these steps to transfer assessment referrals to an alternative assessment organisation or outlet:

- !** Before transferring a referral, the Team leader must ensure:
- The client understands why their referral is being transferred and consents to the transfer of the referral to the new assessment organisation.
 - They have contacted the assessment organisation that will be receiving the client referral to confirm that they will accept the referral.

A referral should not be transferred before confirmation has been obtained that it will be accepted by the receiving assessment organisation.

1. From either the **Incoming referrals**, **Triage pending** or **Accepted referrals** tab of the **Assessment Referrals** tile, select the client's card or listing, and then select **TRANSFER** in the expanded view.

CARD view example:

Anaya GIBSON

Accepted on 23 January 2025

Preferences
No preference was recorded

Assessment details

Assessment type: Comprehensive

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

Assessment setting: Non-Hospital

Assessor: Africa Green

Triage conducted by: Africa Green

Comprehensive Assessment: ● Triage Completed

Latest screening: 22 January 2025

Completed Triage due by 26 January 2025

Client story
No client story was recorded

Comments

VIEW FULL CLIENT RECORD | VIEW CLIENT REPORT

REASSIGN | REJECT | **TRANSFER**

Transfer this referral for ANAYA Gibson

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

What type of assessment does the client require? *

Comprehensive Assessment

Assessment setting: ?

Hospital

Non-Hospital

Search for Assessment Organisation: *

Use the client's address

Client address

38 MCCABE Crescent HOLT ACT 2615

Enter an alternative assessment address

SEARCH

TRANSFER | CANCEL

i Before you transfer, contact the Assessment Organisation you want to refer the client to. Please provide as much information as possible in the comments box below to assist the receiving organisation. Please note, a referral can only be transferred once. Please ensure that you have client consent for assessment type before transferring.

The client has indicated a preference for First Nations Assessment Organisation to do their assessment.

Accessibility | Privacy | Disclaimer | Terms of use | Copyright
Copyright © Commonwealth of Australia ABN 83 605 426 759

LIST view example:

Name	Aged care user ID	Locality	Assessment type	Accepted date	Status
GIBSON Anaya	AC62370622	HOLT, ACT, 2615	Comprehensive	23/01/2025	Triage Completed (Com

Aged 60 (3 March 1965), Female, Identifies as: Aboriginal

Referred from Aged Care Gateway on 22 January 2025
Accepted on 23 January 2025

Preferences
No preference was recorded

Assessment details

Assessment type: Comprehensive

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

Assessment setting: Non-Hospital

Assessor: Africa Green

Triage conducted by: Africa Green

Comprehensive Assessment: ● Triage Completed

Latest screening: 22 January 2025

Completed Triage due by 26 January 2025

Client story
No client story was recorded

Comments

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

[REASSIGN](#) [REJECT](#) [TRANSFER](#)

- The following warning will appear when you select **TRANSFER**.

i Before you transfer, contact the Assessment Organisation you want to refer the client to. Please provide as much information as possible in the comments box below to assist the receiving organisation. Please note, a referral can only be transferred once. Please ensure that you have client consent for assessment type before transferring.

- A pop up appears. Under 'What type of assessment does the client require?', select either **Home Support** or **Comprehensive Assessment**.

For Comprehensive assessment, it will provide an Assessment setting of **Hospital** or **Non-Hospital**. If Home Support Assessment is selected, the assessment setting will disappear.

Once these have been selected, select the button **ADD ADDRESS** to search the address of the assessment organisation.

Comprehensive Assessment example

Transfer this referral for ANAYA Gibson

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

What type of assessment does the client require? *

Comprehensive Assessment

Assessment setting: ?

Hospital

Non-Hospital

Search for Assessment Organisation: *

Use the client's address

Client address

Enter a Hospital address

ADD ADDRESS

SEARCH

TRANSFER CANCEL

Transfer this referral for ANAYA Gibson

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

What type of assessment does the client require? *

Home Support Assessment

Search for Assessment Organisation: *

Use the client's address

Client address

38 MCCABE Crescent HOLT ACT 2615

Enter an alternative assessment address

SEARCH

TRANSFER

CANCEL

4. The **Add address** pop up will appear. Enter the assessment organisation's address, then select **VALIDATE THIS ADDRESS**.

Below a list of addresses will be provided. Select the most relevant address.

To finalise the address, select **SAVE ADDRESS**.

Add address

St Andrew's Hospital

Street number e.g. 201 or 34-36
45

Street name
Governor

Street type
Avenue

Enter Suburb and postcode and select from the list below *
PAGE, ACT, 2614

SUBURB IS NOT LISTED, CLICK HERE

Country *
Australia

VALIDATE THIS ADDRESS

Special instructions (up to 100 characters)

SAVE ADDRESS CANCEL

5. If the assessment setting is **non-hospital**, you can either use the client's address or add an alternative assessment address depending on the client's/representative's preference. Select the appropriate assessment organisation for referral transfer and then select the reason from the drop-down menu.

If the transfer reason is **OTHER**, you will be prompted to add a comment explaining the reason.

Transfer this referral for ANAYA Gibson

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

What type of assessment does the client require? *

Comprehensive Assessment

Assessment setting: ?

- Hospital
 Non-Hospital

Search for Assessment Organisation: *

- Use the client's address

Client address

38 MCCABE Crescent HOLT ACT 2615

- Enter an alternative assessment address

SEARCH

Select Assessment Organisation*

- FNAO-Radhika_FNAO Outlet, Ph 0431 234 567
- FNAO-SWATreeR32_Outlet, Ph 02 6166 3535
- FNAO-TSTOUT1 stnmjfgi, BRADDON, Ph 08 4362 4117
- FNAO-RADHIKAR31_CA_AND_RADHIKAR31_HSA_OUTLET_hlfbwjy, FARRER, Ph 0358817-820000000000
- FNAO-ASSESSOUTLET mycnnen, BRADDON, Ph 0472 412 573
- FNAO-ASSESSOUTLET fnaohmxr, Ph 0402 598 364
- FNAO-Indra_Combine_outlet, BONNER, Ph 0456 786 789
- FNAO-INDRA_EFT_OUTLET1_jfkywzcz, MILTON, Ph 0456 732 134
- FNAO-TSTOUT1 hllyxgly, BRADDON, Ph 02 2642 9419
- FNAO-ASSESSOUTLET fnaopurpose, Ph 07 4482 9749
- FNAO-ASSESSOUTLET_FORNEWUSERS_idvziarf MILTON, Ph 0848952692000000000

Select a reason for transferring this client * ?

Comments:

TRANSFER

CANCEL

Select a reason for transferring this client * ?

Select one

Select one

- Insufficient capacity
- Outside assessment org region
- Client change in circumstances
- Remote Assessment
- Clinical staff not available

Other

6. Once the **TRANSFER** button is selected, a green banner will be displayed confirming the transfer has been completed successfully.



ANAYA Gibson, Referral has been transferred successfully.



If the client has preference to be assessed by a First Nations Assessment Organisation a yellow banner will be displayed advising so.



You are assigning the assessment referral of a client who has preference for the assessment to be done by First Nations Assessment Organisation.

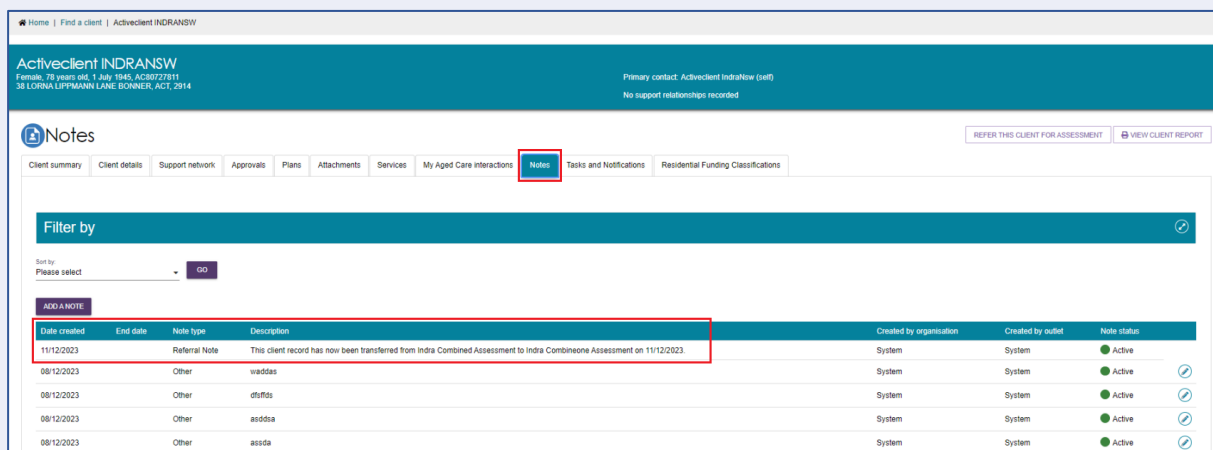
Transferring client records from inactive outlets

Departmental staff can transfer client records linked to an inactive outlet to an active outlet in the same assessment organisation, or to another assessment organisation.

Future Support Plan Review requests or new assessment referrals will be issued to the active outlet. Care extension requests transferred to the active outlet will appear as 'unassigned' in the delegate queue.

The assessors and the contact centre will see a note of the transfer in the My Aged Care client record. The client's online account includes a notification of the transfer.

In the assessor portal, the notification of the transfer can be seen in the **Notes** tab of the client record.

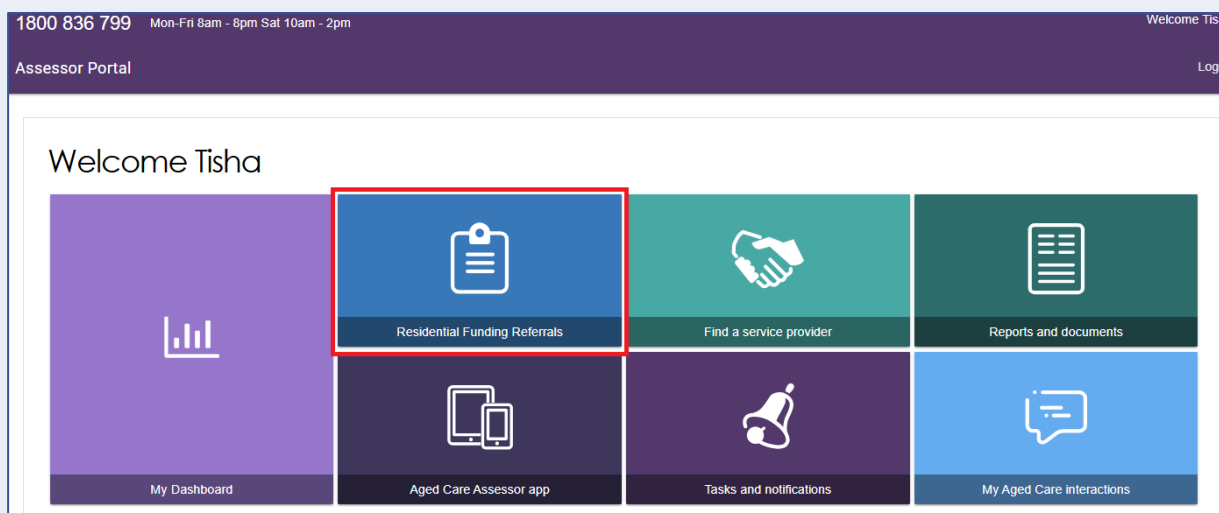


The screenshot shows the 'Notes' tab for a client record in the Activeclient INDRANSW system. The 'Notes' tab is highlighted with a red box. Below the navigation tabs, there is a 'Filter by' section and a table of notes. The first note in the table is highlighted with a red box and contains the text: 'This client record has now been transferred from Indra Combined Assessment to Indra Combinee Assessment on 11/12/2023.'

Date created	End date	Note type	Description	Created by organisation	Created by outlet	Note status
11/12/2023		Referral Note	This client record has now been transferred from Indra Combined Assessment to Indra Combinee Assessment on 11/12/2023.	System	System	Active
08/12/2023		Other	waddsa	System	System	Active
08/12/2023		Other	dtffds	System	System	Active
08/12/2023		Other	asdsda	System	System	Active
08/12/2023		Other	asdsda	System	System	Active

Residential Funding Referrals

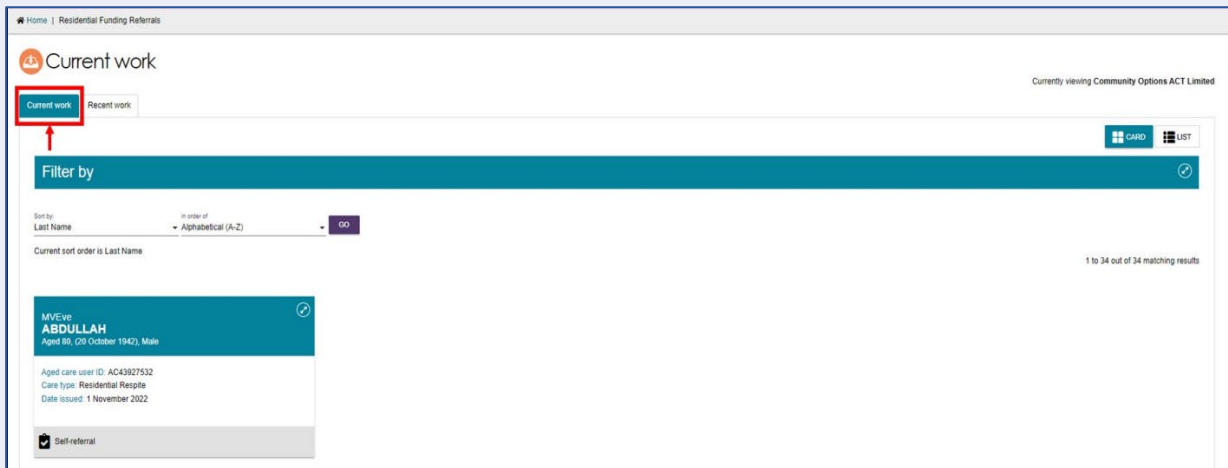
The Residential Funding Referrals tile is available to accept any residential funding referrals.



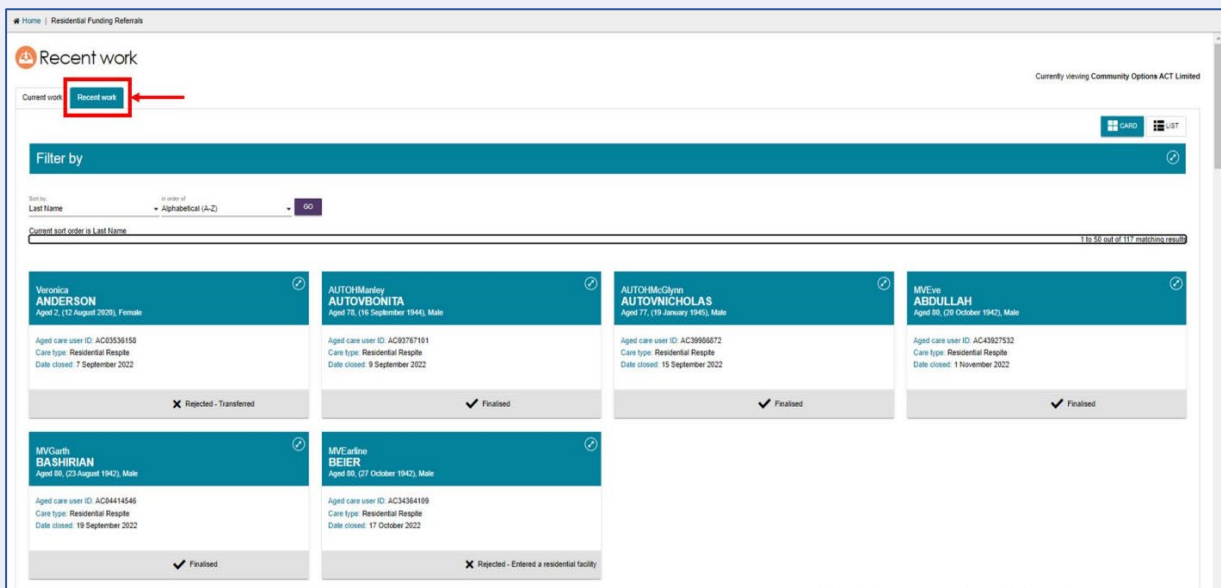
The screenshot shows the Assessor Portal dashboard. The 'Residential Funding Referrals' tile is highlighted with a red box. The dashboard includes a welcome message 'Welcome Tisha' and several other tiles: 'My Dashboard', 'Aged Care Assessor app', 'Tasks and notifications', 'Find a service provider', 'Reports and documents', and 'My Aged Care interactions'.

A clinical aged care needs assessor (clinical needs assessor) will have access to the **Current Work** and **Recent Work** tabs.

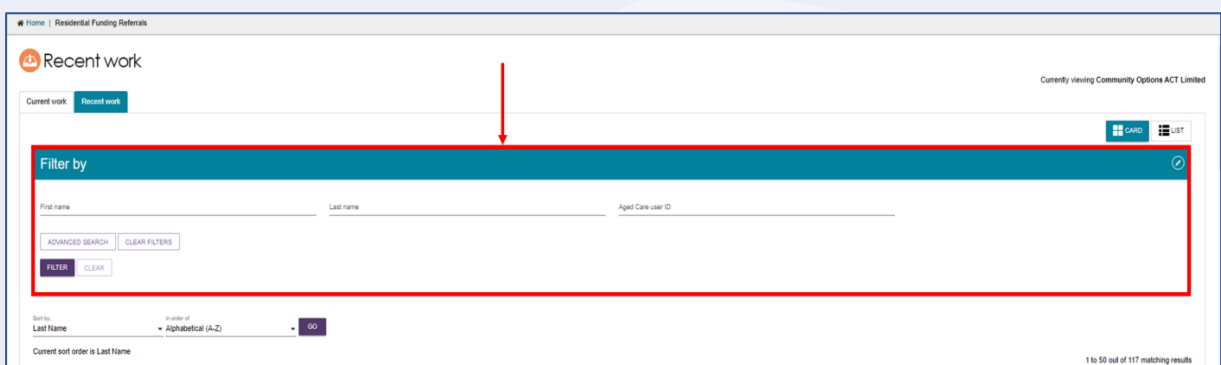
The **Current Work** tab contains Residential Respite Assessments that are assigned to you.



The **Recent Work** tile contains Residential Respite Assessments that you have completed in the past 2 years.



Filters can be applied to both the Current and Recent work tabs.



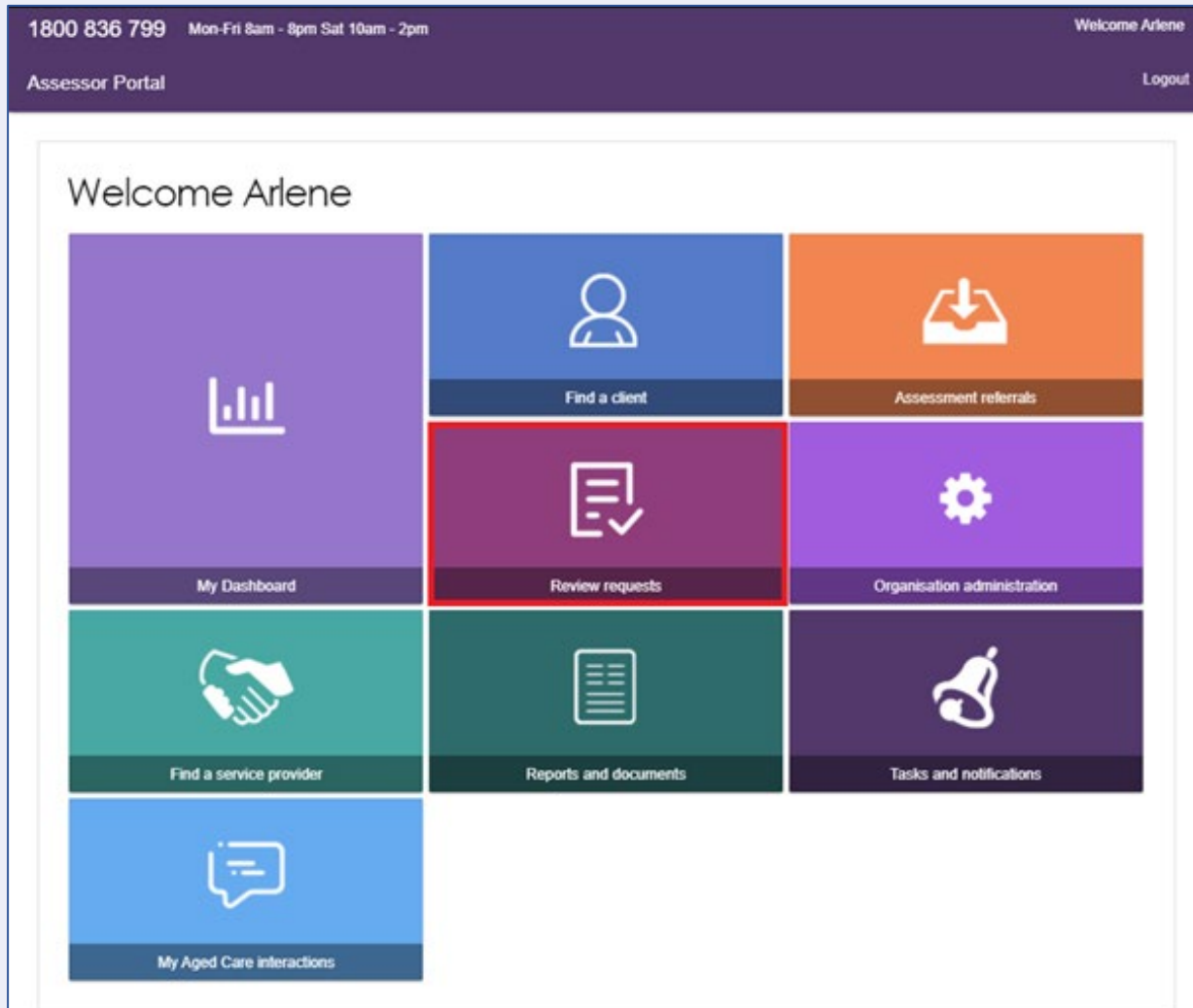
For more information on self-referring a client and starting a Residential Respite Assessment, please refer to the [Aged Care Assessor Application User Guide](#).

Support Plan Reviews

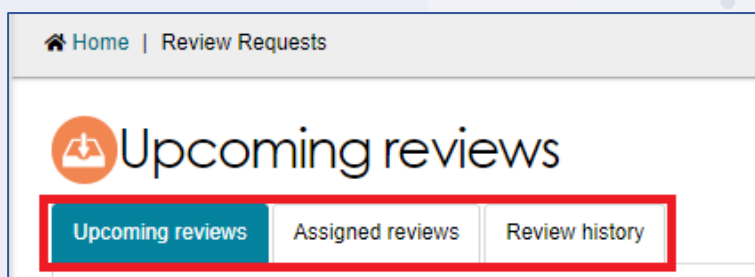
! For a reassessment following a Support Plan Review, triage will be simplified. Assessors can ask the triage questions themselves, with the Triage Delegate only contacting the client if information is missing.

For more information about conducting a Support Plan Review for Support at Home clients, refer to [My Aged Care – Assessor Portal User Guide 7 – Completing a support plan and support plan review | Australian Government Department of Health, Disability and Ageing](#).

Team leaders can manage Support Plan Reviews via the **Review requests** tile on the assessor portal home page.



In the **Review requests** section, team leaders can view **Upcoming reviews**, **Assigned reviews** and **Review history**.



In the **Upcoming reviews** tab team leaders can:

- view scheduled reviews
- view reviews requested by service providers
- assign reviews to assessors
- change review priority
- cancel reviews.

In the **Assigned reviews** tab team leaders can reassign reviews to different assessors.

In the **Review history** tab team leaders can view a history of completed and cancelled reviews.

Viewing Support Plan Reviews

A Support Plan Review request will contain the following information:

- The person/organisation requesting the Support Plan Review
- The assessor who last conducted the assessment
- The urgency for the review to be completed
- Reasons for request including:
 - Client's change in circumstances
 - Impact on client's needs
 - Primary reason for request
 - Services client is currently receiving
 - Options explored to increase the client's current support.

! Upon receiving an urgent review request, the Team Leader must select the double arrow icon to expand the referral card to verify whether it relates to **the End-of-Life pathway** and prioritise it accordingly. Please refer to the '*Identification of End-of-Life Clients*' via Qlik guidance on Assessment Hub'

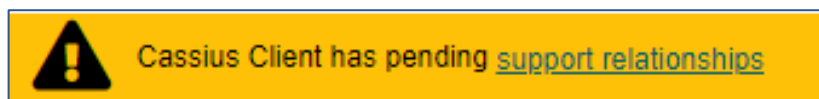
Urgent Support Plan Review request because the client is on the End-Of-Life Pathway

The screenshot shows the 'Upcoming reviews' interface. A modal window for 'Jewell REA' is open, displaying client details and a yellow 'Urgent request' banner. The banner text reads: 'Urgent request', 'Requested: 6 May 2025', and 'Requested action date: 16 May 2025'. Below the banner, the 'Requested by Client' section includes: 'Contact Jewell Rea 02 9885 6245', 'Request submitted by: Place Jane', and 'Client last assessed by: UAT Ford UAT Lovell'. The 'Reason for request' section includes: 'Why is this request urgent? EOL Pathway', 'Clients change in circumstances: Needs End-of-Life Pathway', and 'Impact on client's needs: EOL pathway required'. A red box highlights the 'Urgent request' banner and the 'Request submitted by' and 'Client last assessed by' fields. The modal also features buttons for 'ASSIGN REVIEW', 'CANCEL REVIEW', 'TRANSFER REVIEW', 'VIEW FULL CLIENT RECORD', and 'VIEW ALL CLIENT NOTES'. The background shows a list of reviews with filters and sorting options.

A banner will be displayed on the request if additional attachments have been added to the client's record as part of the Support Plan Review request.

This screenshot is similar to the one above, showing the 'Upcoming reviews' interface with the 'Jewell REA' modal. In this view, the 'ASSIGN REVIEW' button is highlighted with a red box. The 'Urgent request' banner and other details are the same as in the previous screenshot.

! If the client has pending support relationships, a banner will be displayed on the review. Team leaders are able to confirm pending support relationships for clients, this process is described in [My Aged Care – Assessor Portal User Guide 2 – Registering support people and adding relationships](#).



Team leaders can sort, and filter Support Plan Reviews based on several categories.

The screenshot shows the 'Assigned reviews' section of a web application. At the top, there are three tabs: 'Upcoming reviews', 'Assigned reviews' (which is active), and 'Review history'. Below the tabs is a 'Filter by' section. It includes a 'Sort Reviews by:' dropdown menu currently set to 'Scheduled Date', and an 'in order of' dropdown menu set to 'Earliest to Latest'. A 'GO' button is to the right of these menus. A dropdown menu is open, listing various filter options: Last Name, First Name, Aged Care User ID, Suburb, State, PostCode, Scheduled Date, Actual Date, Assessment Status, Review Status, and Urgency. The 'Last Name' through 'Urgency' options are highlighted with a red border. A blue button with a refresh icon is located below the dropdown menu.

Assigning a Support Plan Review

Team leaders will only be able to assign the Support Plan Review request that has the parent assessment type as Home Support assessment to non-clinical aged care needs assessors (non-clinical assessors) within the outlet. If the client is undergoing support, the team leader contacts the assessor to determine whether to end the support period or cancel the review.

The screenshot displays a client review page for 'Alvin CRAYFORD'. The page has a teal header with the client's name. Below the header, there are three main sections:

- Urgent request:** A yellow banner with a warning icon. It states 'Requested: 23 July 2019' and 'Requested action date: 2 August 2019'.
- Files attached:** A light blue banner with an information icon and the text 'Files were attached to this request [View client attachments](#)'.
- Undergoing reablement:** A yellow banner with a warning icon and the text 'Undergoing reablement'.

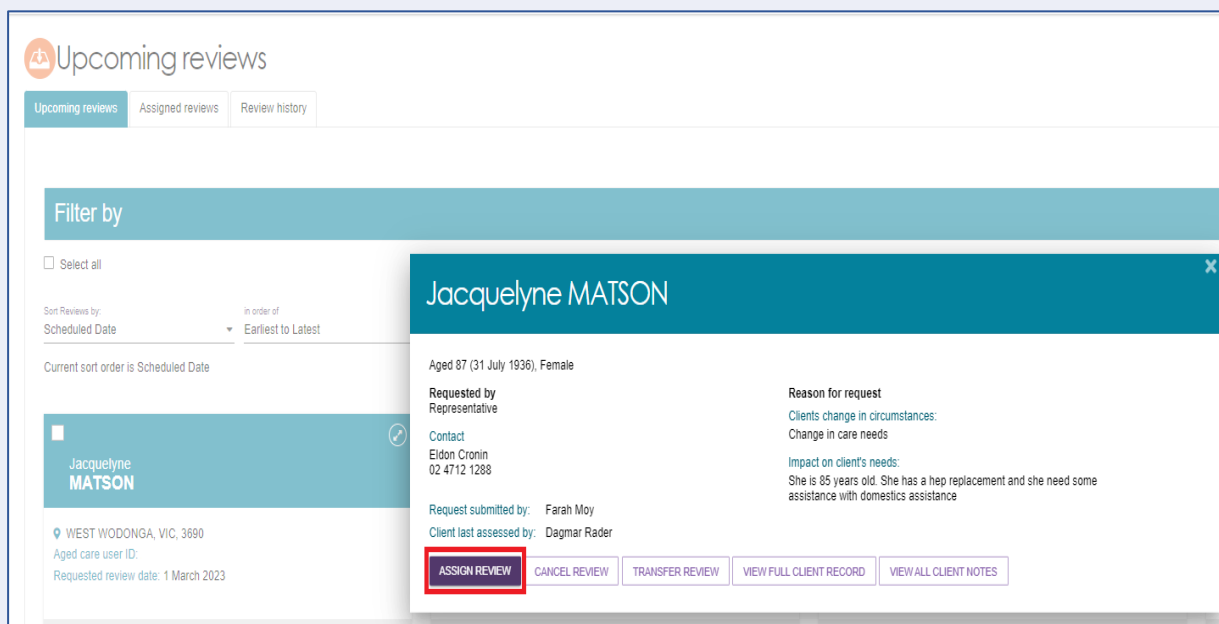
 The main content area is divided into two columns:

- Left Column:**
 - Requested by:** Aged Care Service Provider, Abbyson Hostel
 - Contact:** Tom Senseney, tom.senseney@test.kch.cp
 - Request submitted by:** Aged Care Provider
 - Client last assessed by:** AssessorUser05
 - Assessment Status:** Undergoing Support
- Right Column:**
 - Reason for request:** Why is this request urgent? requires urgent attention
 - Clients change in circumstances:** Risk of vulnerability
 - Impact on client's needs:** Increasing in care needs
 - Primary reason for request:** Request for additional CHSP services for clients who are in receipt of HCP Clients on Level 1 or 2: where budget is allocated, client can access additional short-term or episodic Allied Health and Therapy or Nursing services from CHSP.
 - Services client is currently receiving:** Client is currently receiving domestic assistance at home, to support her day to day activities

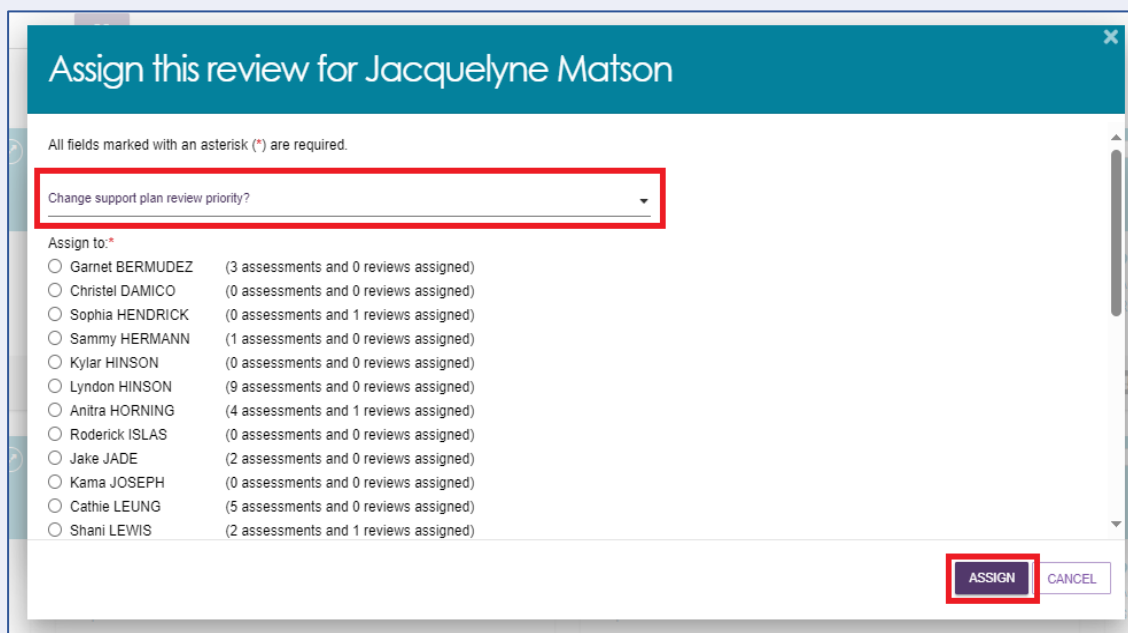
 At the bottom of the page, there are three buttons: 'CANCEL REVIEW', 'VIEW FULL CLIENT RECORD', and 'VIEW ALL CLIENT NOTES'.

Follow these steps to assign a Support Plan Review:

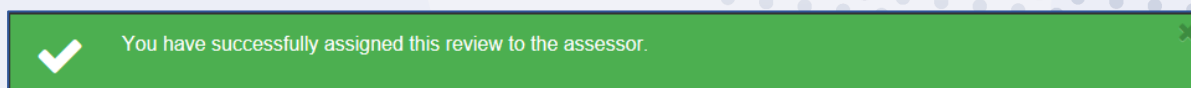
1. Navigate to the **Upcoming reviews** tab and select **ASSIGN REVIEW** on the expanded client card.



2. Before assigning to an assessor, you can change the Support Plan Review priority. Select an assessor to assign the Support Plan Review to and select **ASSIGN**.



3. Once assigned, a banner will appear on the bottom of your screen.




4. The Support Plan Review will now appear in the **Assigned reviews** tab. Assigned reviews will also appear in the **Current reviews** tab of the assessor the review was assigned to.

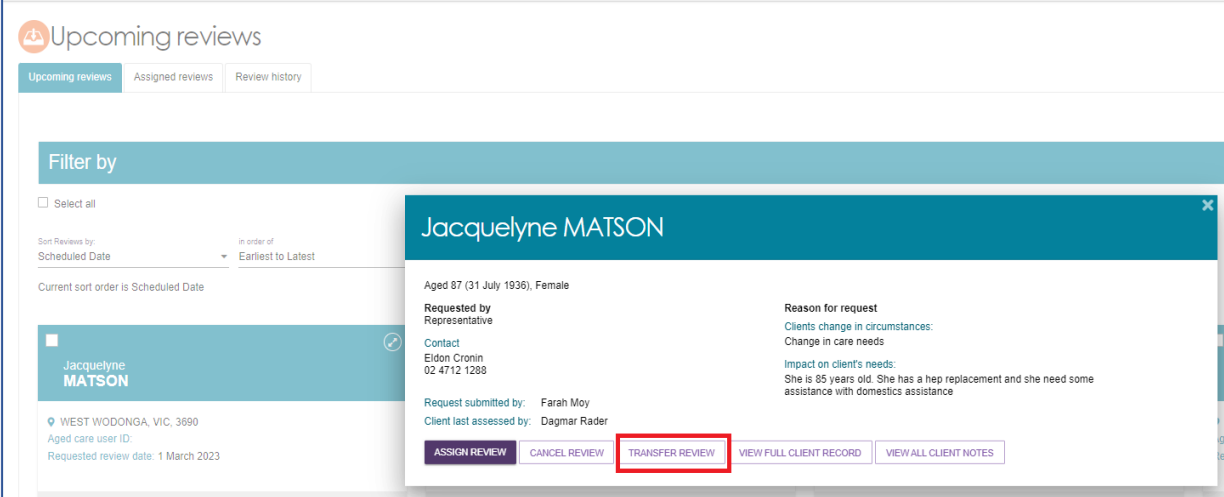
Transferring a Support Plan Review



Team leaders can transfer Support Plan Reviews to other assessment organisations.

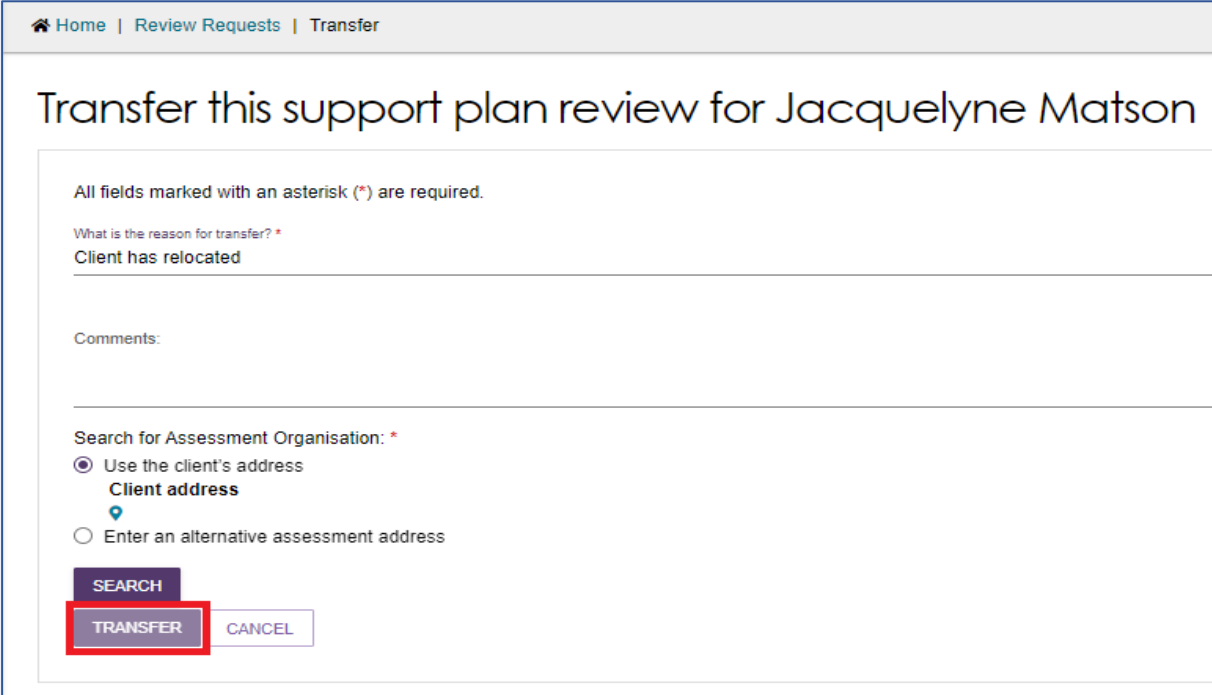
1. To begin transferring a Support Plan Review, go to **Upcoming reviews** and select the client card you wish to transfer for the Support Plan Review. Select **TRANSFER REVIEW**.

 Before making the transfer, please contact the Assessment Organisation you want to refer the client to and provide as much information as possible in the comments box to assist the receiving organisation. Please note, a review can only be transferred once. Please ensure that you have client consent before transferring.



The screenshot shows the 'Upcoming reviews' page. A client card for Jacquelyne MATSON is displayed. The card includes the following information: Aged 87 (31 July 1936), Female; Requested by Representative; Contact: Eldon Cronin, 02 4712 1288; Request submitted by: Farah Moy; Client last assessed by: Dagmar Rader. The 'TRANSFER REVIEW' button is highlighted with a red box. Other buttons include 'ASSIGN REVIEW', 'CANCEL REVIEW', 'VIEW FULL CLIENT RECORD', and 'VIEW ALL CLIENT NOTES'. The card also shows the location 'WEST WODONGA, VIC, 3690' and the requested review date '1 March 2023'.


2. You will need to enter a **What is the reason for the transfer** and search and select the Assessment Organisation which the Support Plan Review will be transferred to. Once the reason for transfer and organisation has been selected, select **TRANSFER**.



The screenshot shows the 'Transfer this support plan review for Jacquelyne Matson' form. The form includes the following fields and options: 'What is the reason for transfer? *' with the selected option 'Client has relocated'; 'Comments:'; 'Search for Assessment Organisation: *' with the selected option 'Use the client's address' and the selected 'Client address'; and a 'SEARCH' button. At the bottom, there are 'TRANSFER' and 'CANCEL' buttons, with the 'TRANSFER' button highlighted in red.

Reassigning a Support Plan Review

Follow these steps to reassign a Support Plan Review:

1. From the **Assigned reviews** tab, expand the client card using the expand icon  and select **REASSIGN REVIEW** on the Support Plan Review to be reassigned or unassigned.



Garnett MARTIN

Aged 81 (27 July 1943), Male

Requested by
Representative

Contact
Roderick Martin
02 4538 7964
Gaynell.Michel@test.oidass.nan

Request submitted by: Nova Son

Client last assessed by: Obadiah Hurley

Assigned to: Nikita Sevilla

Finalised Support Plan Review due by 11 July 2024

Reason for request

Clients change in circumstances:
Change in care needs

Impact on client's needs:
Roger Arrell needs Home maintenance , because Jennifer Williams needs her windows and gutter cleaned and would like to be accessed for Home maintenance due COPD and have blocked artery and needs assistance with Home maintenance..

REASSIGN REVIEW

CANCEL REVIEW

CHANGE PRIORITY

VIEW FULL CLIENT RECORD

VIEW ALL CLIENT NOTES

2. Select another assessor and **REASSIGN**.

Reassign this review for Garnett Martin

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

Assign to:*

<input type="radio"/> Ofelia BALDERAS	(10 assessments and 0 reviews assigned)
<input type="radio"/> Nikita VILLARREAL	(7 assessments and 0 reviews assigned)
<input type="radio"/> Bonita PRENTICE	(0 assessments and 0 reviews assigned)
<input type="radio"/> Louie HINSON	(8 assessments and 0 reviews assigned)
<input type="radio"/> Nadia HINSON	(0 assessments and 7 reviews assigned)
<input type="radio"/> Faith LAWTON	(0 assessments and 0 reviews assigned)
<input type="radio"/> Kyngston MCCANN	(0 assessments and 0 reviews assigned)
<input type="radio"/> Lesley PIATT	(0 assessments and 0 reviews assigned)
<input type="radio"/> Lashawn TAGGART	(15 assessments and 6 reviews assigned)
<input type="radio"/> Gideon HOOD	(0 assessments and 0 reviews assigned)
<input type="radio"/> Nikita SEVILLA	(21 assessments and 8 reviews assigned)
<input type="radio"/> Garnet CLEMENS	(0 assessments and 0 reviews assigned)
<input type="radio"/> Abubakar SOUSA	(24 assessments and 23 reviews assigned)
<input type="radio"/> Obadiah EDMONDSON	(18 assessments and 2 reviews assigned)
<input type="radio"/> Elissa MAZUR	(0 assessments and 0 reviews assigned)
<input type="radio"/>

REASSIGN

CANCEL

3. The Support Plan Review will now be reassigned to the selected assessor and the review will appear in their **Current reviews** tab.

! Team leaders can also reassign Home Care correspondence notifications, by going to **Tasks and notifications** in the assessor portal homepage and selecting the **SAH Notifications** tab. More information on this can be found on [My Aged Care - Assessor Portal User Guide 9 - Tasks and notifications](#).

Re-assign Home Care correspondence notifications

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

Please select Home Care correspondence notification recipient

- Ashten Carvalho
- Jawad Egan
- Benji English
- Shamika Franke
- Kenton Gagne
- Efren Gatlin
- Noma Graziano
- Dominique Guinn
- Kim Hendrick
- Lyn Houle
- Matthias Hyman
- Rayland Knudson
- Roni Kong
- Leleu Kong

SAVE CANCEL

Cancelling a Support Plan Review

In either the **Upcoming reviews** tab or **Assigned reviews** tab, select **CANCEL REVIEW** from the expanded view of the client card for the review to be cancelled.

Garnett MARTIN

Aged 81 (27 July 1943), Male

Requested by
Representative

Contact
Roderick Martin
02 4538 7964
Gaynell.Michel@test.oidass.nan

Request submitted by: Nova Son
Client last assessed by: Obadiah Hurley
Assigned to: Nikita Sevilla
Finalised Support Plan Review due by 11 July 2024

Reason for request
Clients change in circumstances:
Change in care needs

Impact on client's needs:
Roger Arrell needs Home maintenance , because Jennifer Williams needs her windows and gutter cleaned and would like to be accessed for Home maintenance due COPD and have blocked artery and needs assistance with Home maintenance. .

REASSIGN REVIEW **CANCEL REVIEW** CHANGE PRIORITY VIEW FULL CLIENT RECORD

VIEW ALL CLIENT NOTES

Select a reason for the cancellation from the with a brief explanation on the details field and then select **CANCEL REVIEW REQUEST**.

Cancel this review for Garnett Martin

Reason for cancellation *
Select one

- Select one
- Insufficient information
- Sent in error
- Client withdrew request
- Client declined – no consent
- Client medically unstable
- Client deceased
- Unable to contact client

CANCEL REVIEW REQUEST CANCEL

Cancel this review for Garnett Martin

Reason for cancellation *
Unable to contact client

Details: *
Client/Representative was unable to be contacted. Tried contacting multiple times and left voice messages |

106 / 255

CANCEL REVIEW REQUEST CANCEL

The review will be removed from the Upcoming reviews tab. Completed and cancelled Support Plan Reviews will also appear in the Recent reviews tab of the assessor who completed the review. Support Plan Reviews will also be cancelled automatically where a new assessment referral is issued and accepted for the client. This will allow the new assessment to commence without requiring the Support Plan Review to be completed.

Cancelling a Support Plan Review with the reason of Client deceased

! Cancelling a Support Plan Review with the reason of **Client deceased** will change the client's status to **Deceased** and make the client record read only. Any unaccepted service referrals will be recalled, services in place will be ceased, assessments will be cancelled and the client's access to the client portal will be revoked. My Aged Care will not send correspondence to the client or their supporters after the status is changed to **Deceased**. My Aged Care will send a notification to the client's assessor and provider advising them to close or finalise any in-progress items. Where a client is active in the Support at Home Priority System or has been allocated funding, this will remove the client from the Support at Home Priority System and withdraw any allocated funding.

1. When cancelling a Support Plan Review with the reason of **Client deceased**, you will need to provide the following information:
 - who, when and how you were informed that this person is deceased
e.g. "Mrs Smith rang to inform us that Mr Smith has passed away on Saturday"
 - date of death (if known)
 - attachments (e.g. death certificate, hospital discharge documents).
2. Support Plan Reviews will also be cancelled automatically where a new assessment referral is issued and accepted for the client. This will allow the new assessment to commence without requiring the Support Plan Review to be completed.

Cancel this review for Garnett Martin

Reason for cancellation *
Client deceased

You are about to notify the department that Garnett Martin has passed away. Their record will become read only. You will still be able to finalise outstanding assessments and support plan reviews, and add notes and attachments.

Please supply the following information:

Who, when and how were you informed that this person is deceased? * ?

0 / 500

Date of death (if known)

dd/mm/yyyy

0 / 255

Add Attachments
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 (if available)

Choose a file...

Details: *

0 / 255

CANCEL REVIEW REQUEST CANCEL

3. Notes and attachments can be attached to the client record after the status is set to **Deceased**.
4. When a client's status is changed to **Deceased**, if they have an in-progress assessment or has commenced services, a notification will be sent to the associated assessor in the assessor portal, advising the assessor to close or finalise the in-progress tasks.

Change priority for a Support Plan Review

Team leaders can change the priority of a Support Plan when assigning a review to an assessor in the **Upcoming reviews**.

- ! If the Support Plan Review has been requested for clients to access the **Support at Home End-of-Life Pathway**, the request will be classed as an **Urgent request** and the circumstances will be "Needs End-of-Life Pathway". The urgency must not be modified unless the original review requested did not appropriately flag for the End-of-Life Pathway – in these circumstances the priority must be updated to urgent.

The screenshot shows a yellow header bar with a warning icon and the text "Urgent request" and "Requested: 6 May 2025". To the right, it says "Requested action date: 16 May 2025". Below the header, there are two columns of information. The left column contains: "Requested by: Client", "Contact: Jewell Rea, 02 9885 6245", "Request submitted by: Place Jane", "Client last assessed by: UAT.Ford UAT.Lovell", and "Finalised Support Plan Review due by 20 May 2025". The right column, titled "Reason for request", contains: "Why is this request urgent? EOL Pathway", "Clients change in circumstances: Needs End-of-Life Pathway", and "Impact on client's needs: EOL pathway required". Red boxes highlight the "Urgent request" status and the "Reason for request" section.

Follow these steps to change Support Plan Review priority after it has been assigned:

1. Navigate to the **Assigned reviews** tab, open a client card or listing and select **CHANGE PRIORITY**.

The screenshot shows a client card for "Garnett MARTIN". The card includes personal details: "Aged 81 (27 July 1943), Male". It also lists "Requested by: Representative", "Contact: Roderick Martin, 02 4538 7964, Gaynell.Michel@test.oidass.nan", "Request submitted by: Nova Son", "Client last assessed by: Obadiah Hurley", "Assigned to: Nikita Sevilla", and "Finalised Support Plan Review due by 11 July 2024". The "Reason for request" section contains: "Clients change in circumstances: Change in care needs" and "Impact on client's needs: Roger Arrell needs Home maintenance, because Jennifer Williams needs her windows and gutter cleaned and would like to be accessed for Home maintenance due COPD and have blocked artery and needs assistance with Home maintenance..". At the bottom, there are five buttons: "REASSIGN REVIEW", "CANCEL REVIEW", "CHANGE PRIORITY" (highlighted with a red box), "VIEW FULL CLIENT RECORD", and "VIEW ALL CLIENT NOTES".

2. Select the new priority from the drop-down list then select **CHANGE PRIORITY**. When changing priority to **Urgent** you must add the reason for changing the priority in the **Reason description** section, then select **CHANGE PRIORITY**.

Change support plan review priority for Garnett Martin

Change support plan review priority *
Urgent

Reason description: *
Sudden decline in Health condition. Need urgent care

52 / 255

CHANGE PRIORITY CANCEL

REASSIGN REVIEW CANCEL REVIEW CHANGE PRIORITY VIEW FULL CLIENT RECORD VIEW ALL CLIENT NOTES

3. A confirmation message will be displayed, and the review's priority will be displayed in the **Assigned review** tab.

