



Assessor Portal User Guide 9 - Tasks and Notifications

A **task** is an activity that an aged care needs assessor (assessor) needs to action (finalise/close).

A **notification** is an activity that informs the assessor of an event. The assessor may need to complete an action as a result of the notification.

The My Aged Care assessor portal (assessor portal) contains notifications and prompts users to action tasks.

Preferences can also be configured by your outlet’s Administrator to enable an email alert to be sent for tasks and notifications.

You can also manage your task and notification preferences.

All staff with access to the assessor portal will have access to view tasks and notifications.

You will receive a notification when a client’s status has changed to ‘Deceased’.

You should review the client record to see if further action is required, for example you may need to close any active referrals or assessment records for the client.

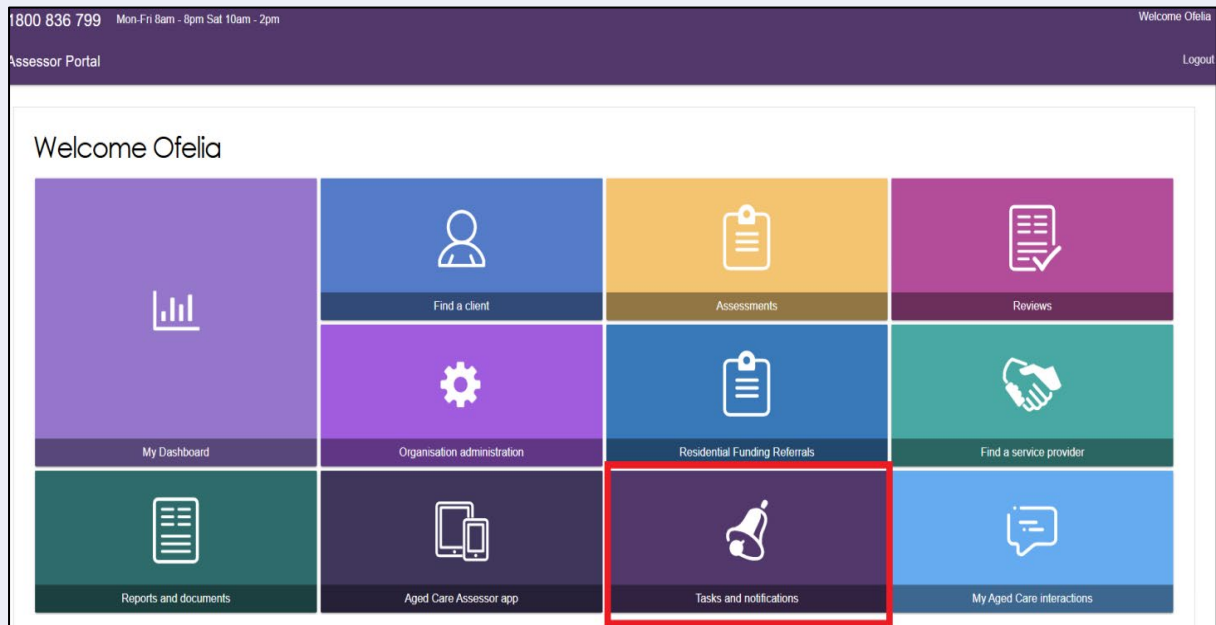
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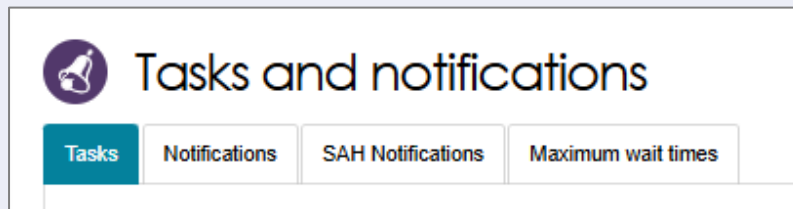
Viewing and actioning tasks

Assessors will be able to see all tasks and notifications for clients in the tasks and notifications tab, however service providers will only be able to see tasks and notifications that are associated to their outlet and for clients they are providing services to.

1. From the assessor portal homepage select **Tasks and notifications**.

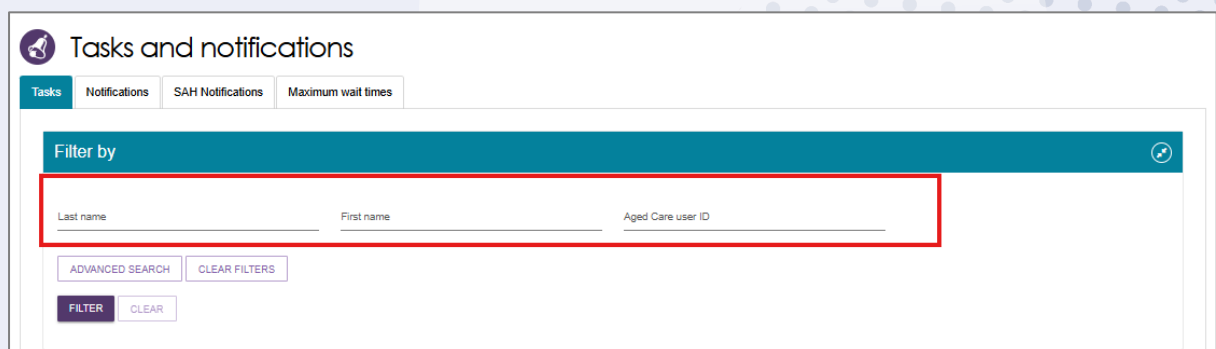


2. The **Tasks and notifications** screen will be displayed as shown below. This layout will be same for all assessor types (i.e. Clinical and Non-clinical).



3. In the **Tasks** tab, you will be able to search the tasks by typing either one of the below options.

- Last Name
- First Name
- Aged Care User ID



You can further filter the task by selecting the **ADVANCED SEARCH** button.

The screenshot shows the 'Tasks and notifications' header with tabs for 'Tasks', 'Notifications', 'SAH Notifications', and 'Maximum wait times'. Below is a 'Filter by' section with input fields for 'Last name', 'First name', and 'Aged Care user ID'. The 'ADVANCED SEARCH' button is highlighted with a red box. Other buttons include 'CLEAR FILTERS', 'FILTER', and 'CLEAR'.

4. A pop-up screen will be displayed. To sort the tasks by specific order, choose value from the dropdown list. Select **ADD FILTER** button.


The screenshot shows the 'Search tasks' pop-up screen. A message at the top states 'Selected filter values have been cleared.' Below is a 'Tasks' section with a dropdown menu 'Choose an item.' and buttons 'ADD FILTER', 'SAVE FILTER', and 'CLEAR FILTER'. The dropdown menu is open, showing a list of filter criteria: Activity ID, Aged Care user ID, Category, Date received, Due date, First name, Last name, Marked as important, Outlet name, Overdue tasks, Role, and Title. The 'ADD FILTER' button is highlighted with a red box. At the bottom right are 'FILTER' and 'CANCEL' buttons.

Below example shows the tasks to be sorted by Outlet name, Marked as important, Last Name and First Name. Select **FILTER**.

The screenshot shows the 'Search tasks' pop-up screen with the filter criteria selected. The 'Tasks' section shows '4 of 7 filters used'. The selected filters are: 'Outlet name', 'Marked as important', 'Last name', and 'First name'. Each filter has a red box around it. The 'ADD FILTER', 'SAVE FILTER', and 'CLEAR FILTER' buttons are visible. At the bottom right are 'FILTER' and 'CANCEL' buttons, with the 'FILTER' button highlighted with a red box.

A list of all the tasks as per the requested criteria will be displayed in the **TASKS AND**

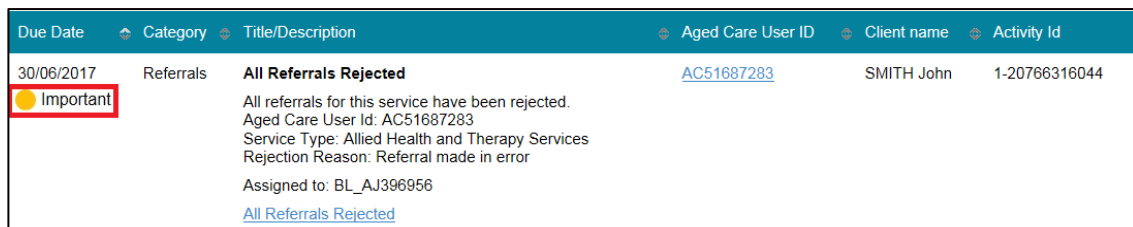
NOTIFICATIONS screen.

5. You can choose the order to be displayed (i.e. ascending or descending, Category, etc.) by clicking the **UP/DOWN**  arrow next to each column title.



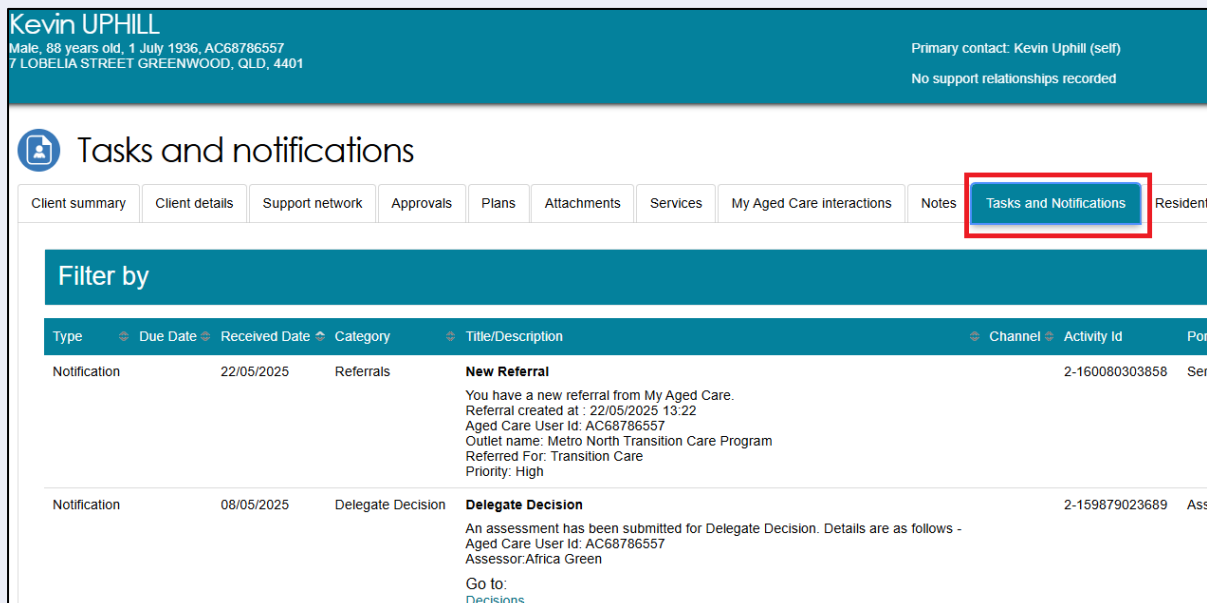
Received	Category	Title/Description
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! Certain types of tasks can be marked as important for your outlet by your outlet administrator. When these tasks are created, they will be displayed with a visual indicator. The [Managing task and notification preferences](#) section in this guide explains how to set tasks as important.



Due Date	Category	Title/Description	Aged Care User ID	Client name	Activity Id
30/06/2017	Referrals	All Referrals Rejected All referrals for this service have been rejected. Aged Care User Id: AC51687283 Service Type: Allied Health and Therapy Services Rejection Reason: Referral made in error Assigned to: BL_AJ396956 All Referrals Rejected	AC51687283	SMITH John	1-20766316044

6. Alternatively, if you want to see all tasks and notifications for a single client, navigate to the **Tasks and Notifications** tab in the client's record to see all relevant tasks and notifications for that client.



Kevin UPHILL
Male, 88 years old, 1 July 1936, AC68786557
7 LOBELIA STREET GREENWOOD, QLD, 4401

Primary contact: Kevin Uphill (self)
No support relationships recorded

Tasks and notifications

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

Filter by

Type	Due Date	Received Date	Category	Title/Description	Channel	Activity Id	Por
Notification		22/05/2025	Referrals	New Referral You have a new referral from My Aged Care. Referral created at : 22/05/2025 13:22 Aged Care User Id: AC68786557 Outlet name: Metro North Transition Care Program Referred For: Transition Care Priority: High		2-160080303858	Ser
Notification		08/05/2025	Delegate Decision	Delegate Decision An assessment has been submitted for Delegate Decision. Details are as follows - Aged Care User Id: AC68786557 Assessor: Africa Green Go to: Decisions		2-159879023689	Ass

7. The hyperlink under the task description will take you directly to the individual record and the section of the portal where you can action the task.

Alternatively, you can navigate to the client's record by selecting the client's Aged Care ID from the tasks list.

Tasks and notifications

Tasks | **Notifications** | SAH Notifications | Maximum wait times

Filter by

Last name _____ First name _____

ADVANCED SEARCH CLEAR FILTERS

Date received is after 28 March 2025 and Outlet name is UAT CR910C Assessment Outlet

FILTER CLEAR

Select all

Received	Category	Title/Description
26 September 2025	Delegate Decision	<p>Formal Delegate Decision</p> <p>A formal Delegate Decision has been made on the approval of the Aged Care Act 2024. Details are as follows -</p> <p>Aged Care User Id: AC28711695</p> <p>Delegate Name: William Boscop</p> <p>Date decision made: 25/09/2025 09:00:00 AM</p> <p>Decision details: Care Approved for Assessment</p> <p>Activity Id: 2-161999349999</p> <p>Go to: Match and Refer</p>

8. Selecting the hyperlink will take you directly to the client's support plan where you can review the referral and take further action as required.

Support plan and services

REQUEST ASSESSMENT COMPREHENSIVE A

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

Services not yet in place

Support at Home

Support at Home ● Referral Code Generated

Home Support Ongoing - SaH Classification 3

- Funding pending
- Assistive Technology Short-term - AT Medium

No associated goals

Recommended By: Africa Green

User Type: Assessor

FIND PROVIDERS SEE SERVICE DETAILS

9. Once the action required from the task has been completed, the task will be removed from your task list.

Certain tasks may close automatically once an action has been taken by another My Aged Care user (e.g. when a service provider accepts a referral that has triggered a task for assessor to follow up, the task is automatically closed in the assessor portal).

! If you believe you have completed a task and it has not been removed from your portal, please call the My Aged Care Service Provider and assessor helpline on 1800 836 799 who will be able to assist in completing the task.

10. Assessors can also change the client's status to deceased by opening the **Client details** tab and selecting **NOTIFY MY AGED CARE OF A DEATH**.

Mrs Isela HEFLIN
Female, 87 years old, 1 December 1937, AC94954740
Lot Number 18 5 STURDEE STREET WENTWORTHVILLE, NSW, 2145
Primary contact: Lesley Fryer (Supporter, Child) - 02 6624 4749
View support network

Client details

REFER THIS CLIENT FOR ASSESSMENT VIEW CLIENT REPORT

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

Tasks and Notifications Residential Funding Classifications

About Isela NOTIFY MY AGED CARE OF A DEATH

11. When **NOTIFY MY AGED CARE OF A DEATH** is selected you will be taken to **Notify My Aged Care that person is deceased** screen where you will have to complete relevant information.

Notify My Aged Care that a person is deceased

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

You are about to notify the department that Isela Heflin 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

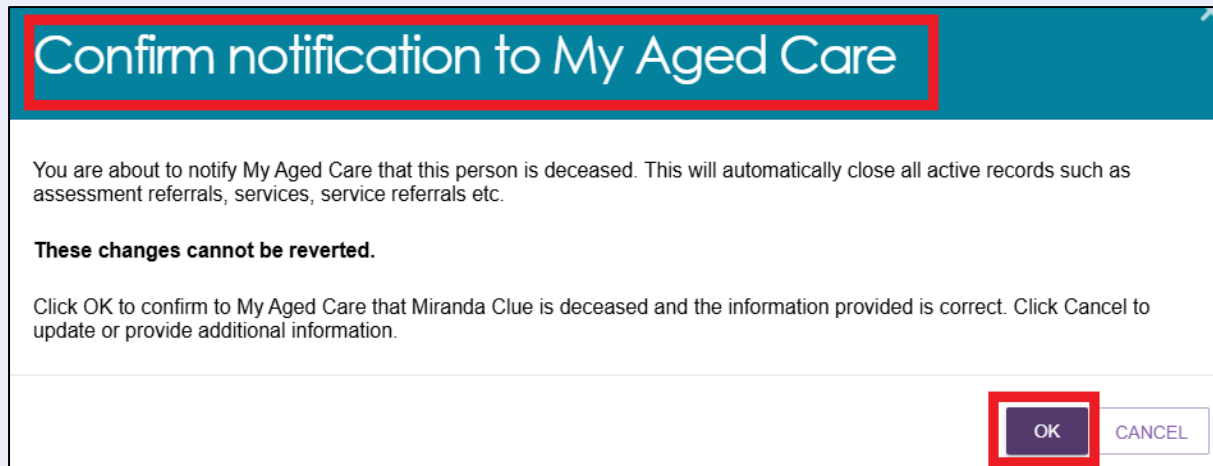
Add Attachments

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)

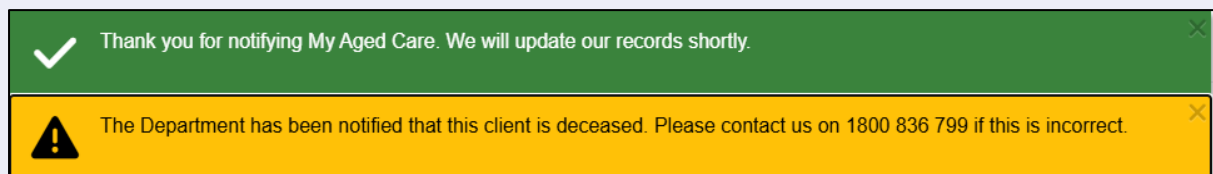
Choose a file...

SAVE CANCEL

A dialogue box will be displayed. To confirm, select **OK**.



You will be directed to the **CLIENT DETAILS** page where the following banners will be displayed.



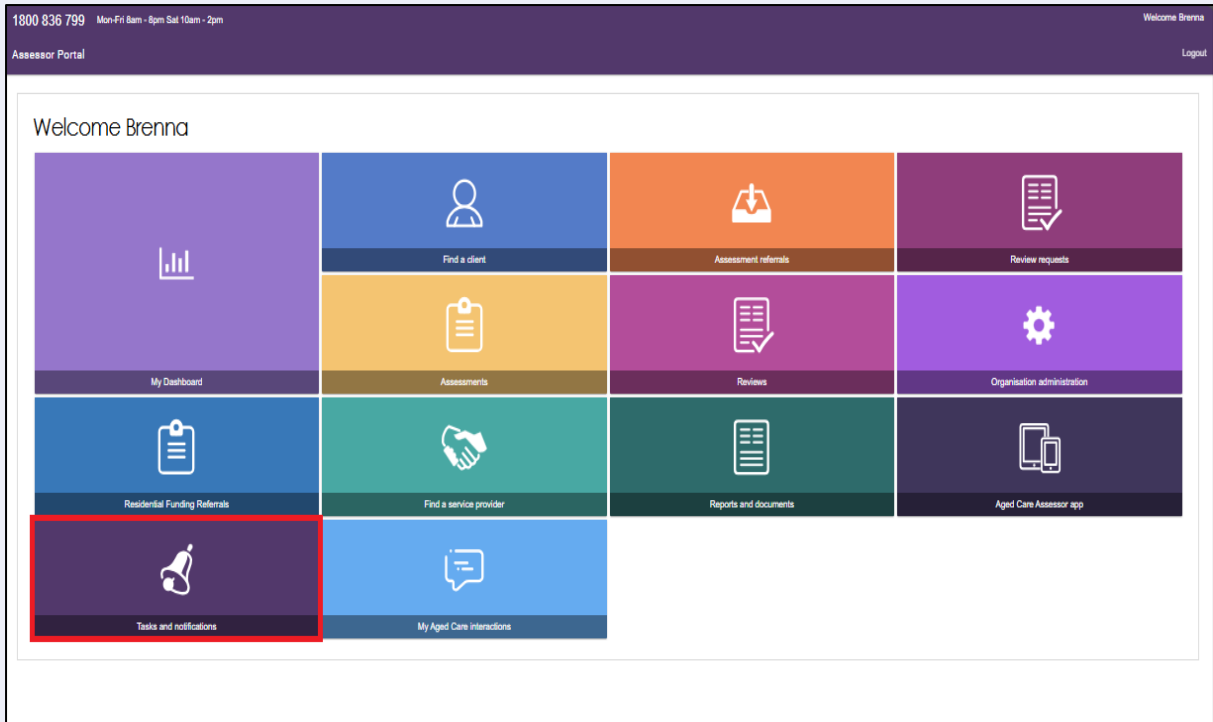
The client status will be updated to **Deceased** on the records. The client card will appear as shown in the example below. If there are any in-progress assessments for the client, a notification will be sent to the associated assessor and provider advising them to close or finalise the in-progress tasks.



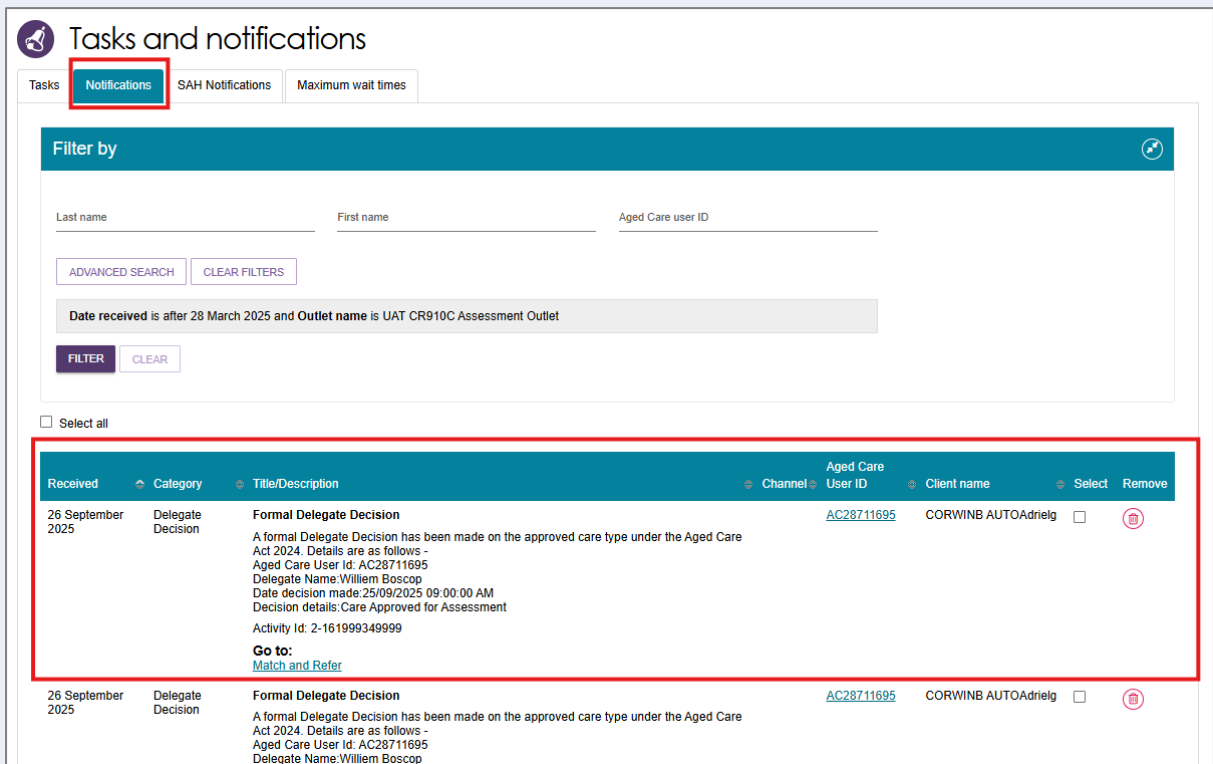
Viewing notifications

Assessors will be able to see all tasks and notifications for clients, however service providers will only be able to see tasks and notifications that are associated to their outlet and for clients they are providing services.

1. From the assessor portal homepage select **Tasks and notifications** and select the **Notifications** tab.



In the **Notifications** tab, you will be able to view all notifications relevant to your role.



- Alternatively, if you want to see all tasks and notifications for a single client, navigate to the **Tasks and Notifications** tab in the client's record to see all relevant tasks and notifications for that client.

Mrs Isela HEFLIN
Female, 87 years old, 1 December 1937, AC94954740
Lot Number 18 5 STURDEE STREET WENTWORTHVILLE, NSW, 2145

Primary contact: Lesley Fryer (Supporter, Child) - 02 6624 4749
[View support network](#)


Tasks and notifications






REFER THIS

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

Filter by


Type	Due Date	Received Date	Category	Title/Description	Channel	Activity Id	Portal	Outlet
Notification		21/05/2025	Delegate Decision	Delegate Decision An assessment has been submitted for Delegate Decision. Details are as follows - Aged Care User Id: AC94954740 Assessor:Anica Green Go to: Decisions		2-160064376178	Assessor Portal	
Notification		21/05/2025	Referrals	New Referral You have a new referral from My Aged Care. Referral created at 21/05/2025 11:45 for Aged Care User Id: AC94954740 Outlet name:GRAZIER AGED CARE - ACA - ACT Assessment Type:Comprehensive Assessment Priority:Low Go to: Incoming Referrals		2-160064375746	Assessor Portal	GP CA

3. In the **Notifications** tab, you can sort notifications by any of the columns on the table by selecting the **UP/DOWN**  arrow next to the column title.

Received  Category  Title/Description  Channel  Aged Care User ID 

! As with tasks, certain types of notifications can be marked as important for your outlet by your outlet administrator.

When these notifications are created, they will be displayed with a visual indicator. The [Managing task and notification preferences](#) section in this guide explains how to set notifications as important.

Received	Category	Title/Description	Aged Care User ID	Client name	Select	Remove
28/06/2017	Client Correspondence	Home care correspondence Client is now seeking home care services. Your client Andy Jorgensen (Aged Care User ID AC48007322), is now seeking home care services. Full details are contained in the client letter which will typically be available within 24 hours. The letter can be accessed from the 'Attachments' tab in their client record. Activity Id: 1-9JE2VIG Correspondence	AC48007322	JORGENSEN Andy	<input type="checkbox"/>	

Home Support notifications will display in the **Notifications** tab if enabled in the client's support plan or on the **Approvals** tab in the client record.

4. You can also remove individual or bulk notifications from your portal by selecting the Remove icon or **Select all** checkbox.

Select all

Received	Category	Title/Description	Aged Care User ID
22 May 2025	Delegate Decision	Formal Delegate A formal Delegate Aged Care User Id: Delegate Name: P Date decision made: Decision Status: C Activity Id: 2-16000 Go to: Match and Refer	38106
22 May 2025	Referrals	New Referral You have a new referral from My Aged Care.	33588

Remove Notification

This will remove selected notification from the current notifications list.

- You can search for specific notifications using the filter options or using custom filters in Advanced Search. Select the arrows to the right to expand or collapse the filter options.

The screenshot shows the 'Tasks and notifications' header with tabs for 'Tasks', 'Notifications', 'SAH Notifications', and 'Maximum wait times'. Below the tabs is a 'Filter by' section with input fields for 'Last name', 'First name', and 'Aged Care user ID'. There are buttons for 'ADVANCED SEARCH', 'CLEAR FILTERS', 'FILTER', and 'CLEAR'.

- To apply custom filters, select **ADVANCED SEARCH** and choose filters from the drop-down menu and select **ADD FILTER** for each filter you want to apply.

The screenshot shows the 'Search notifications' header. Below it is a message: 'Selected filter values have been cleared.' The main section is titled 'Notifications' and contains a dropdown menu labeled 'Choose an item.' with a list of filter options: Activity ID, Aged Care user ID, Category, Date received, First name, Last name, Marked as important, Outlet name, Role, and Title. There are buttons for 'ADD FILTER', 'SAVE FILTER', 'CLEAR FILTER', 'FILTER', and 'CANCEL'.

Below example will sort all notifications received between 01/01/2025 to 22/05/2025.

The screenshot shows the 'Search notifications' header. Below it is a message: 'Selected filter values have been cleared.' The main section is titled 'Notifications' and contains a dropdown menu labeled 'Choose an item.' with a list of filter options: Activity ID, Aged Care user ID, Category, Date received, First name, Last name, Marked as important, Outlet name, Role, and Title. There are buttons for 'ADD FILTER', 'SAVE FILTER', 'CLEAR FILTER', 'FILTER', and 'CANCEL'. Below the filter options, it says '1 of 7 filters used'. A filter is applied: 'Date received' with a date range from '01/01/2025' to '22/05/2025'. There are calendar icons and a trash icon next to the date range. There are buttons for 'FILTER' and 'CANCEL'.

- The list of all notifications meeting the above criteria will be displayed under the **NOTIFICATIONS** tab as shown in the example below.

Tasks and notifications

Tasks **Notifications** SAH Notifications Maximum wait times

Filter by

Last name _____ First name _____ Aged Care user ID _____

ADVANCED SEARCH CLEAR FILTERS

Date received is after 28 March 2025 and Outlet name is UAT CR910C Assessment Outlet

FILTER CLEAR

Select all

Received	Category	Title/Description	Channel	Aged Care User ID	Client name	Select	Remove
26 September 2025	Delegate Decision	Formal Delegate Decision A formal Delegate Decision has been made on the approved care type under the Aged Care Act 2024. Details are as follows - Aged Care User Id: AC28711695 Delegate Name:William Boscop Date decision made:25/09/2025 09:00:00 AM Decision details:Care Approved for Assessment Activity Id: 2-161999349999 Go to: Match and Refer		AC28711695	CORWINB AUTOAdriegl	<input type="checkbox"/>	
26 September 2025	Delegate Decision	Formal Delegate Decision A formal Delegate Decision has been made on the approved care type under the Aged Care Act 2024. Details are as follows - Aged Care User Id: AC28711695 Delegate Name:William Boscop		AC28711695	CORWINB AUTOAdriegl	<input type="checkbox"/>	

- The hyperlink under the notification description will take you directly to the individual record and the section of the portal where you can view more information about the notification or complete any action that may be required.

Tasks and notifications

Tasks **Notifications** SAH Notifications Maximum wait times

Filter by

Last name _____ First name _____ Aged Care user ID _____

ADVANCED SEARCH CLEAR FILTERS

Date received is after 28 March 2025 and Outlet name is UAT CR910C Assessment Outlet

FILTER CLEAR

Select all

Received	Category	Title/Description	Channel	Aged Care User ID	Client name	Select	Remove
26 September 2025	Delegate Decision	Formal Delegate Decision A formal Delegate Decision has been made on the approved care type under the Aged Care Act 2024. Details are as follows - Aged Care User Id: AC28711695 Delegate Name:William Boscop Date decision made:25/09/2025 09:00:00 AM Decision details:Care Approved for Assessment Activity Id: 2-161999349999 Go to: Match and Refer		AC28711695	CORWINB AUTOAdriegl	<input type="checkbox"/>	
26 September 2025	Delegate Decision	Formal Delegate Decision A formal Delegate Decision has been made on the approved care type under the Aged Care Act 2024. Details are as follows - Aged Care User Id: AC28711695 Delegate Name:William Boscop		AC28711695	CORWINB AUTOAdriegl	<input type="checkbox"/>	

- For example, selecting the link in a **Formal Delegate Decision** notification will take you directly to the client's support plan where you can match and refer for the recently approved care type.

Viewing and reassigning Support at Home notifications

You must be assigned in the team leader role to view which assessor or delegate is currently receiving the client's Support at Home correspondence notifications.

You will also have the ability to reassign a client or an individual or make bulk reassignment changes to a different assessor or delegate within an outlet.

- In the **Tasks and Notifications** tab select **SAH Notifications** tab.

If you manage more than one outlet you may choose which outlet to view from the dropdown.

Select **GO** after choosing the outlet.

- The last column is a select tick box which allows the team lead to complete individual or bulk reassignments:

SAH Notifications

Tasks Notifications **SAH Notifications** Maximum wait times

With 2 selected **REASSIGN**

1 to 9 out of 9 matching results

Last name	First name	Aged care user id	Locality	Who receives the notification	Select
BANKS	Billy	AC75119917	BREMER BAY, WA, 6338	Prospect Free	<input type="checkbox"/>
YINDI	Thomas KK	AC16332744	CHELSEA, VIC, 3196	Thomas silverstone	<input checked="" type="checkbox"/>
ARCHERON	Nesta	AC69275808	CULCAIRN, NSW, 2660	Africa Green	<input type="checkbox"/>
PETERS	Karrin	AC36358992	DONVALE, VIC, 3111	Africa Green	<input type="checkbox"/>
RADECKI	Marge	AC61912416	HALLS GAP, VIC, 3381	Prospect Free	<input checked="" type="checkbox"/>
MALONE	Tony	AC14193783	KEW, NSW, 2439	Africa Green	<input type="checkbox"/>
HUNT	Darren	AC71451785	NORTHCOTE, VIC, 3070	Veg Kale	<input type="checkbox"/>
RYAN	Delphine	AC55865695	OUYEN, VIC, 3490	Andy Flower	<input type="checkbox"/>
SMITH	Eugene	AC41046889	SANS SOUCI, NSW, 2219	Africa Green	<input type="checkbox"/>

By selecting the **REASSIGN** button, the **Re-assign Home Care correspondence notifications** pop up will be displayed where you can select the new recipient and finalise by clicking the **SAVE** button.

Re-assign Home Care correspondence notifications

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

Please select Home Care correspondence notification recipient

- Prospect Free
- Africa Green
- Veg Kale

SAVE CANCEL

Managing task and notification preferences

You must be assigned an administrator role to manage task and notification preferences for your organisation or outlet.

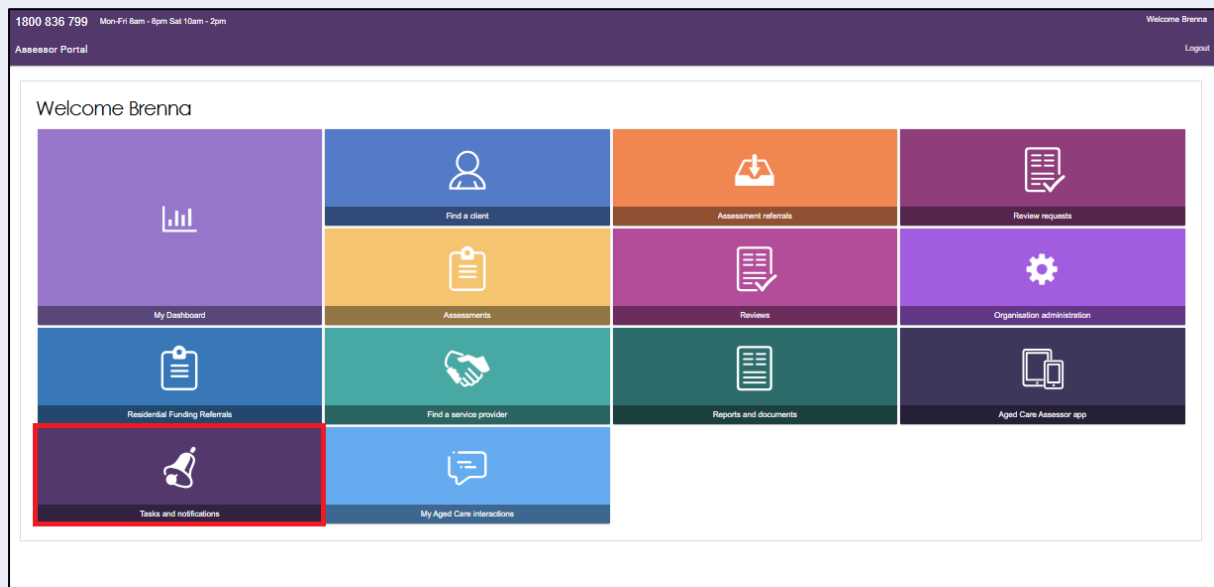
If you need to add this role to your user account, please see your organisation administrator.

As an administrator, you will be able to:

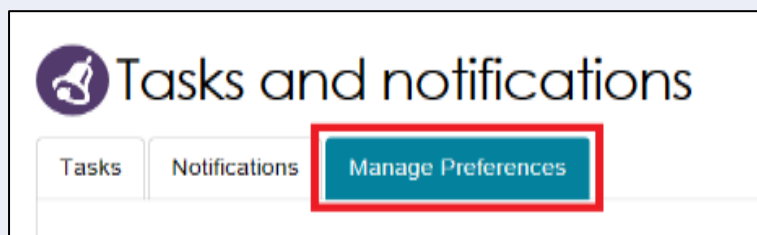
- edit email address and email frequency for new task and notifications
- turn off visibility of notifications in the assessor portal
- view description of each task and notification, including which user types will be able to see them
- edit individual task and notification preferences
- mark a task or notification as important to your outlet.

These settings will affect all staff assigned to your outlet, so please ensure all staff are made aware of any changes you make.

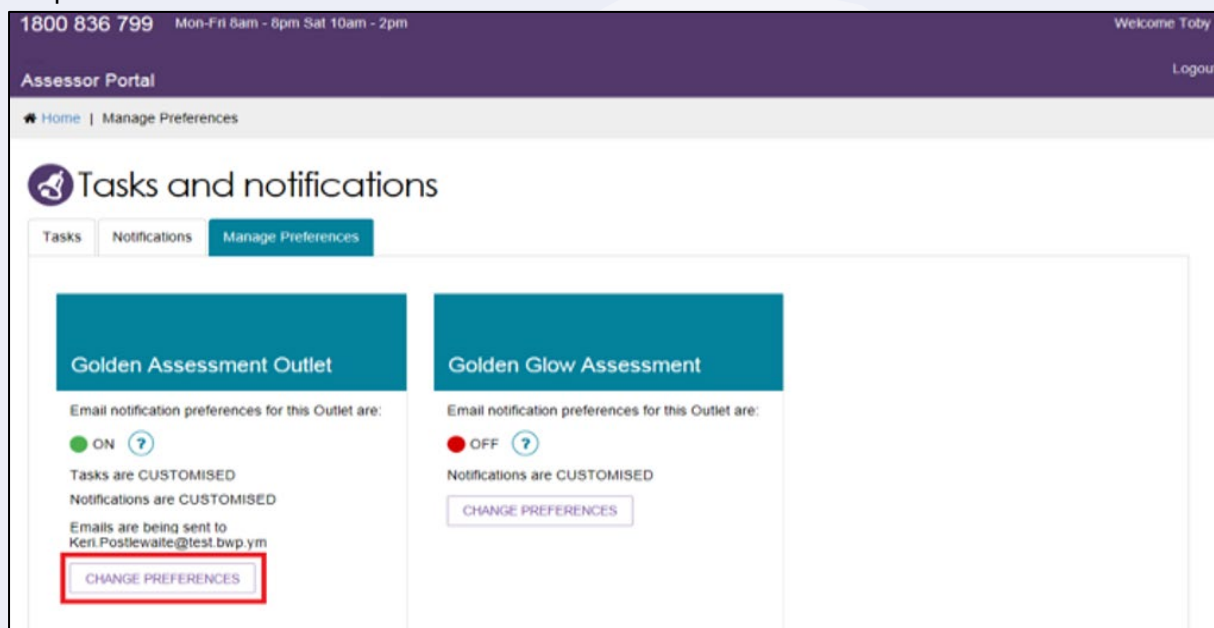
1. From the assessor portal homepage select **Tasks and notifications**.



2. Select the **Manage Preferences** tab.



3. If you are the administrator for your organisation, you will be able to select which outlet you want to configure task and notification preferences for. Select **CHANGE PREFERENCES**. If you are the administrator for your outlet, you will only be able to see your outlet's preferences.



- The preferences page for the outlet will open. At the top of the page, you can configure the overall preferences for email preference, email address, email frequency and notification visibility in the portal.

You can choose to hide all notifications or hide individual notification types for the outlet.

Selecting **No** to hide all means that no notifications for the outlet will be visible to staff associated with the outlet.

Selecting **No** for an individual notification type means that only notifications of that type will be hidden for staff associated with the outlet.

Change preferences for Golden Assessment Outlet

Receive emails for new tasks and notifications ?

Yes No





Send email to:
myagedcare@health.gov.au

Send emails: ?




Show notifications in the portal? ?


Yes No

RESET PREFERENCES ?


- Assessment 
- Client Correspondence 
- Client Services 
- Delegate Decision 


Tasks and notifications are sorted by category. Select the **Expand** (double arrow) icon to expand/collapse each category.

- Assessment 
- Client Correspondence 
- Client Services 

 **Task: Overdue Referral**
A referral has not been accepted or rejected within required timeframes. Please review and action this referral as soon as possible
This task is seen by: Assessor Team Lead
Send an email when this type of task is received?
 Yes No
Send the email:
Immediate

Show this type of task as important?
 Yes No

 **Notification: Client Identity and Info**
A client has been deactivated in the My Aged Care system. Please review and close/finalise any active assessment records.
This notification is seen by: Assessor
Send an email when this type of notification is received?
 Yes No



For each task or notification you will be able to view:

- Type (e.g. task or notification)
- Title and brief description of the why the task or notification has triggered
- User type who can view or action the task or notification.

For each task or notification you will be able to individually configure:

- Whether to send an email when a task or notification generates
- Frequency of email notification, if enabled
- Whether to display a task or notification as important in the portal.

! If you choose to mark a task or notification as important, staff within your outlet who can view that particular task/notification will see a visual indicator in their portal.

Received	Category	Title/Description	Aged Care User ID	Client name	Select	Remove
28/06/2017	Client Correspondence	Home care correspondence Client is now seeking home care services Your client Andy Jorgensen (Aged Care User ID AC48007322), is now seeking home care services. Full details are contained in the client letter which will typically be available within 24 hours. The letter can be accessed from the 'Attachments' tab in their client record. Activity Id: 1-9JE2VIG Correspondence	AC48007322	JORGENSEN Andy	<input type="checkbox"/>	

5. Select **SAVE** when all changes have been made. You can reset the preferences by selecting **RESET PREFERENCES** at the top of the page.

Selecting the arrow in the bottom right of the screen will automatically take you to the top of the page.

Assessor Portal Logout

Show this type of notification in the portal when it is received?

Show this type of notification as important?

Notification: Request Delegate position
Request for Delegate Position has been rejected by the Department.
This notification is seen by: Assessor Team Lead

Send an email when this type of notification is received?

Send the email:
Immediate

Show this type of notification in the portal when it is received?

Show this type of notification as important?

Notification of Support at Home correspondence

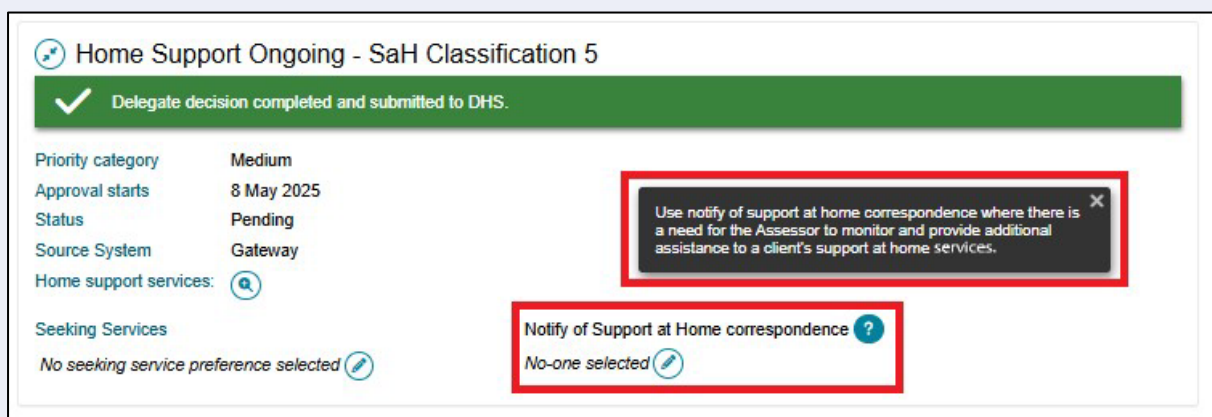
For those clients that a clinical assessor wishes to monitor more closely, clinical assessors can elect to be notified of Support at Home correspondence sent to the client.

This notification can be enabled from any tab in the clients support plan or on the **Approvals** tab in the client record. This option is only visible if there is a recommendation for Support at Home services.



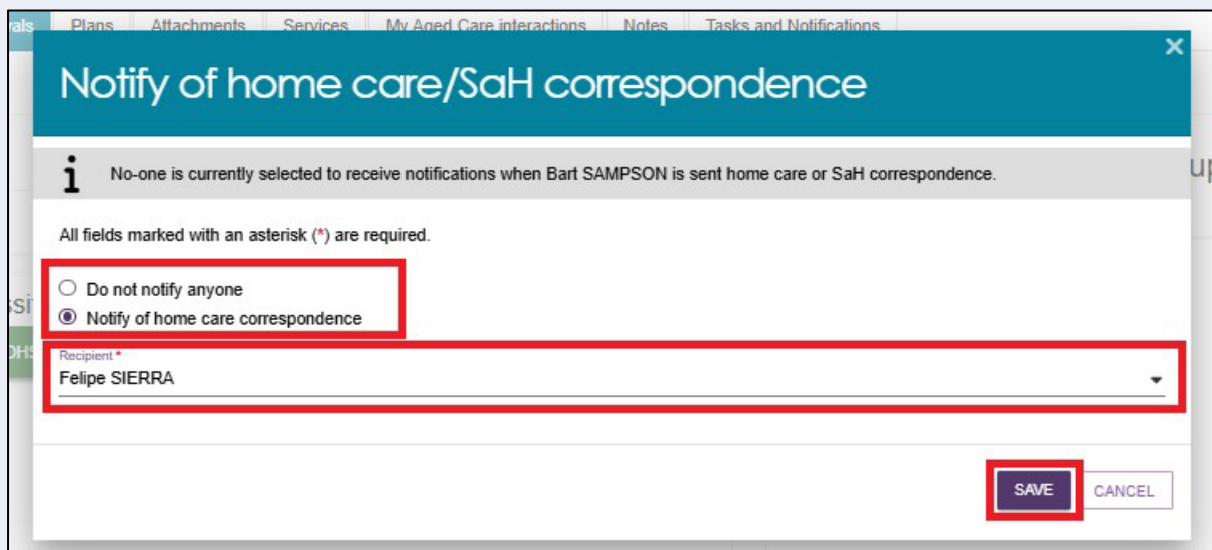
The notification link will only be enabled if the client has been marked as **Seeking services** or a Support at Home recommendation has been made.

This is also available when viewing Home Care Approvals in the client record, as shown below.



Only one person from an outlet can be selected to receive this notification. The preference is shown below.

All clinical assessors and assessment delegates from the assessment outlet will be displayed in a drop-down menu.

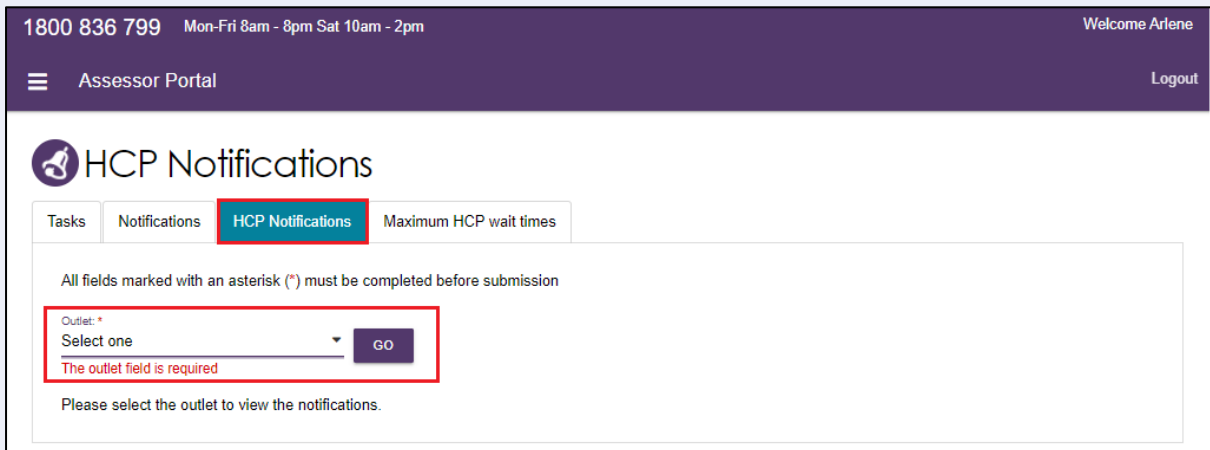


Team Leader role

In the team leader role, you can view which clinical assessor or Assessment Delegate is currently receiving the client's Support at Home correspondence notifications.

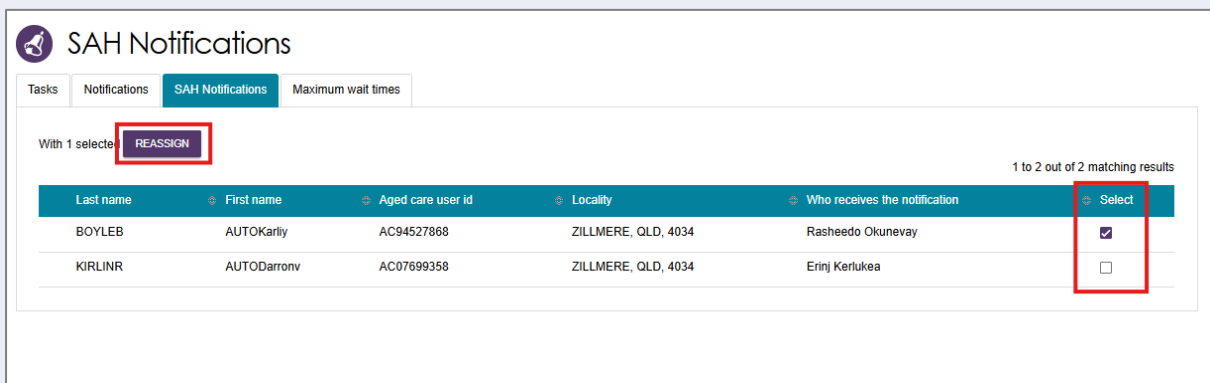
You will also have the ability to reassign a client or an individual or make bulk reassignment changes to a different clinical assessor or Assessment Delegate in an outlet.

In the **Tasks and Notifications** tab select **Notifications** tab. If you manage more than one outlet you may choose which outlet to view from the dropdown.



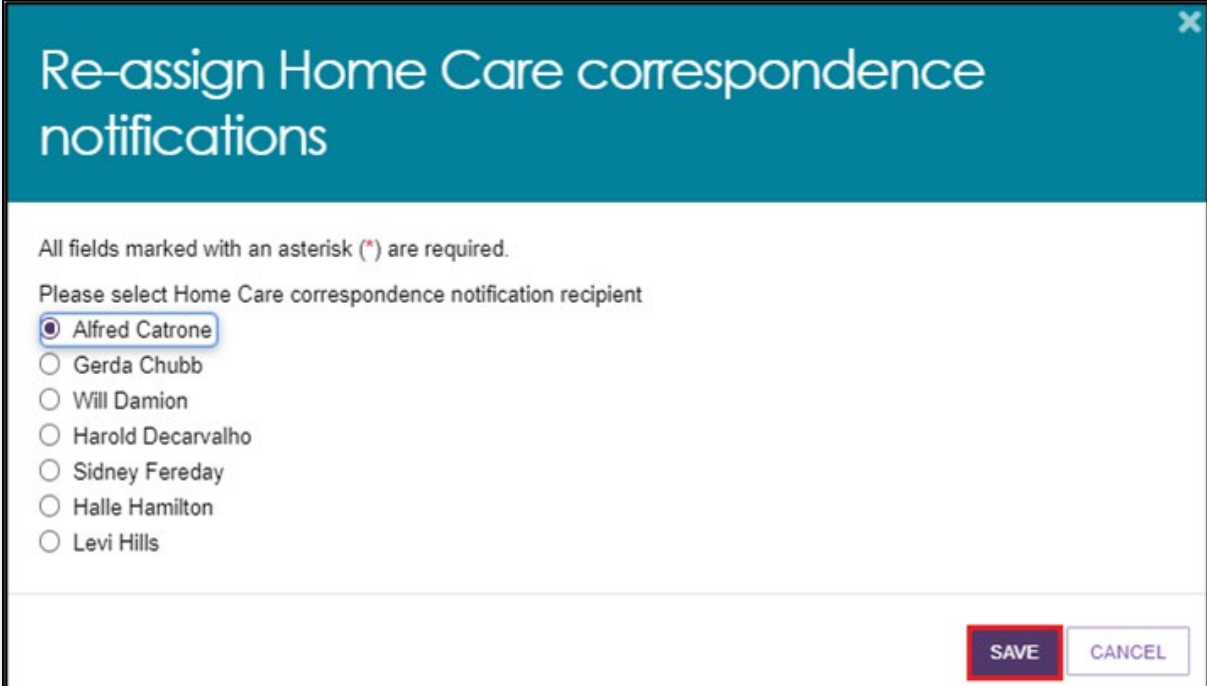
1. Once you have chosen the outlet to view you will see the following details:

- Last Name
- First Name
- Aged Care User ID
- Locality
- Who receives the notification (First name, Last name)
- tick box which allows the team lead to complete individual or bulk reassignments.



Last name	First name	Aged care user id	Locality	Who receives the notification	Select
BOYLEB	AUTOKarliy	AC94527868	ZILLMERE, QLD, 4034	Rasheedo Okunevay	<input checked="" type="checkbox"/>
KIRLINR	AUTODarronv	AC07699358	ZILLMERE, QLD, 4034	Erinj Kerlukea	<input type="checkbox"/>

2. By selecting the **REASSIGN** button, the **Re-assign Home Care correspondence notifications** pop-up will be displayed where you can select the new recipient and finalise by clicking the **SAVE** button.



Re-assign Home Care correspondence notifications

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

Please select Home Care correspondence notification recipient

Alfred Catrone

Gerda Chubb

Will Damion

Harold Decarvalho

Sidney Fereday

Halle Hamilton

Levi Hills

SAVE CANCEL

! Refer to the [Support at Home correspondence sent to clients](#) section for actual letter templates.

Notification of Residential Permanent correspondence

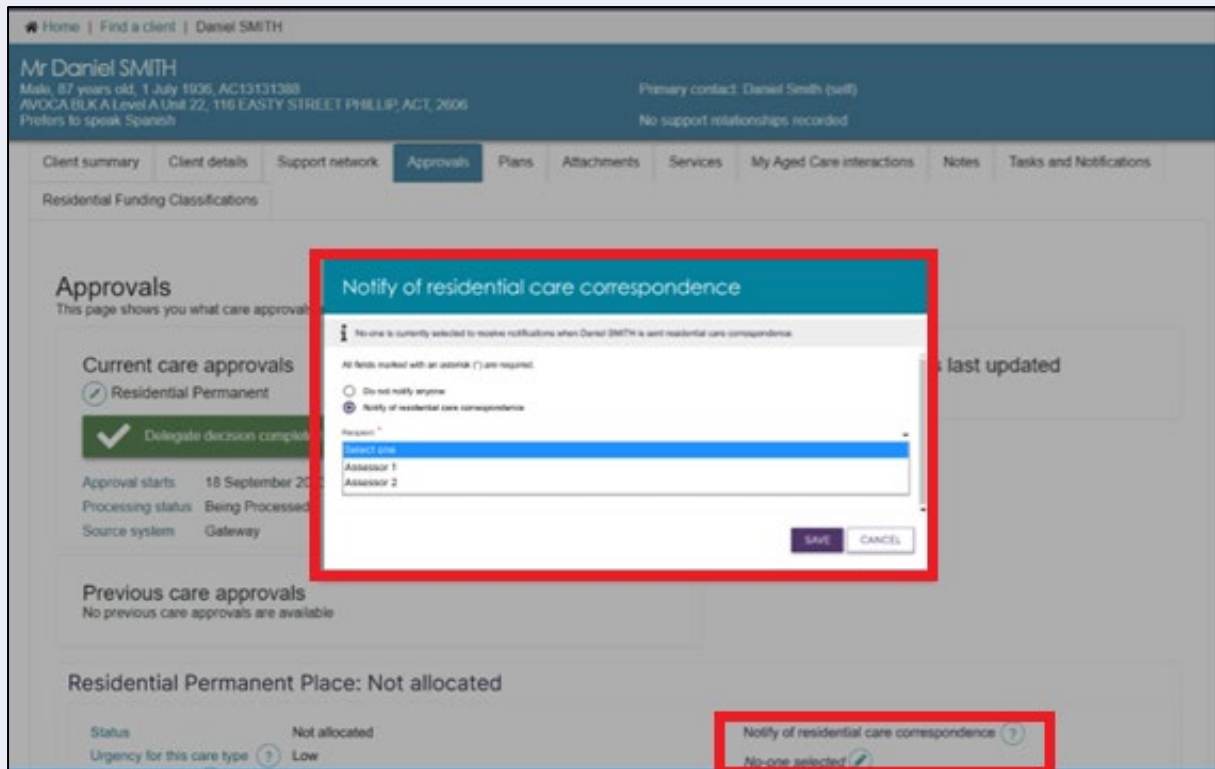
Clients and/or their registered supporters will be notified about their Residential Permanent place allocation, including waiting for a place, and being allocated a place. These notifications are sent by email, SMS and mail.

If nominated, the assessor can also receive system notifications on behalf of the client.

Notifications of residential care correspondence for assessors can be set during the Delegate Decision stage. Alternatively, go to the client's profile and select the **Approvals** tab.

For each residential care approval, select the Edit (pencil) icon under the Notify of **Residential care correspondence** section.

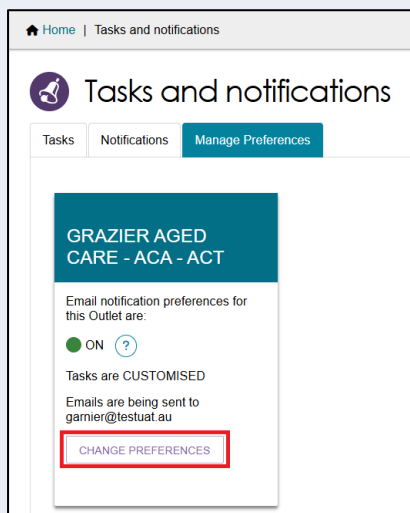
Select the assessor to be notified in the pop up and then select **Save**.



Outlet administrators can manage Residential care correspondence preferences.

To manage preferences:

1. select the outlet, then go to its Tasks and Notifications tile, then the **Manage Preferences** tab. Select **Change Preferences** inside the pop up.



2. Scroll down to the relevant section and adjust the settings by selecting the Yes/No toggles. The following shows an example of the RAC Place Restriction notification underneath the Delegate Decision heading. Toggles available are:
 - Send an email when this type of notification is received?
 - Show this type of notification in the portal when it is received?
 - Show this type of notification as important?

Home | Manage preferences

Notification: Action: RAC place restriction

This activity is a notification sent to assessor advising that their approval for place is about to expire.

This notification is seen by: Assessor Team Lead and Assessor

Send an email when this type of notification is received?

Yes No

Send the email:

Immediate

Show this type of notification in the portal when it is received?

Yes No

Show this type of notification as important?

Yes **No**

To view Residential Permanent correspondence notification for a client, go to the Tasks and Notifications tile, then go to the **Notifications** tab.

The below screenshot shows an example of a **RAC Place Restriction** notification.

Tasks and notifications

Tasks Notifications Manage Preferences HCP Notifications Maximum HCP wait times

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

Filter by

Last name First name Aged Care user ID

ADVANCED SEARCH CLEAR FILTERS

Date received is after 16 May 2023 and Outlet name is ACT ACAT

FILTER CLEAR

Select all

Outlet: ACT ACAT GO

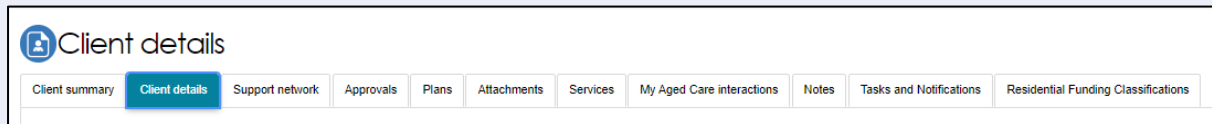
Received	Category	Title/Description	Channel	Aged Care User ID	Client name	Select	Remove
10 November 2023	Delegate Decision	<p>Action: RAC place restriction</p> <p>This is to inform you that the permanent residential aged care place for Daniel SMITH, AC53077160 is due to become restricted on 10 December 2023.</p> <p>This is because their approval for permanent residential aged care was time-limited and is due to expire.</p> <p>Please take further action and arrange a re-assessment for the client in question.</p> <p>If you do not take any further action, government subsidies may stop for the client.</p> <p>Activity Id: 2-152408719461</p> <p>Go to: Approvals</p>		AC53077160	SMITH Daniel	<input type="checkbox"/>	

Confirming client contact information is accurate

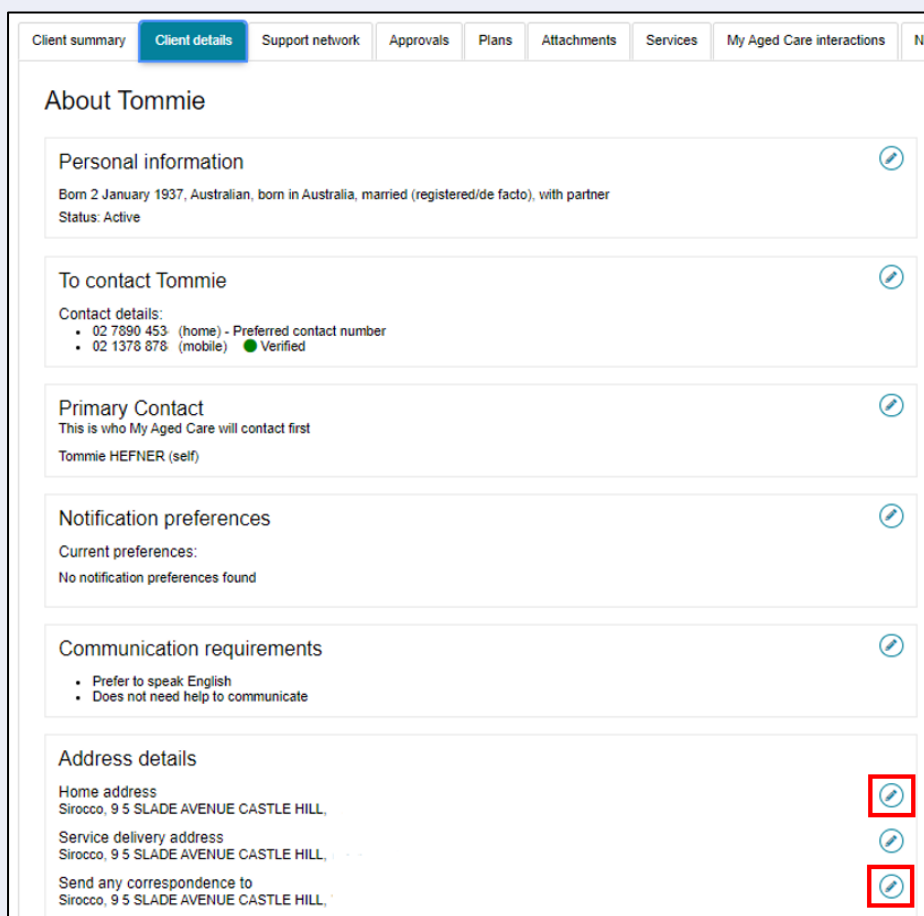
To ensure correspondence is received, the client's address details need to be correct. This is particularly important for Support at Home participants as they have 56 days in which to enter a Support at Home Service Agreement, with an additional 28 days if required.

To view and edit client's contact details within the assessor portal follow the below instructions.

1. From the client card, select **Client Details**.



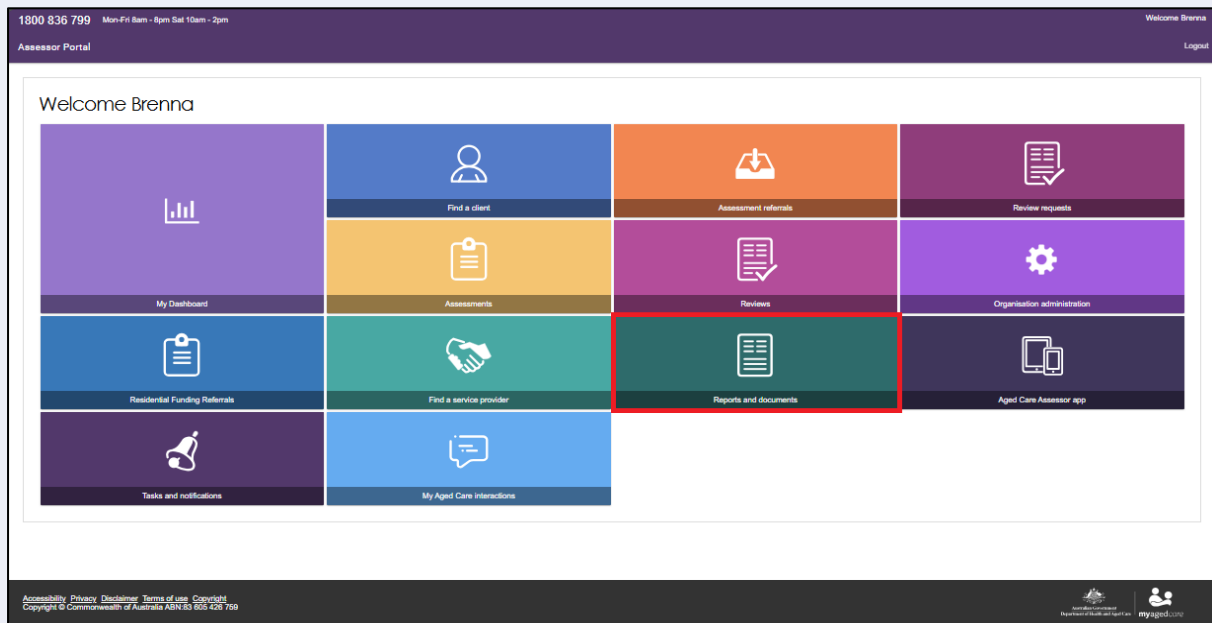
2. At the bottom of the client details page, select the **pencil (edit) icon** to then edit the client's home and/or correspondence address.



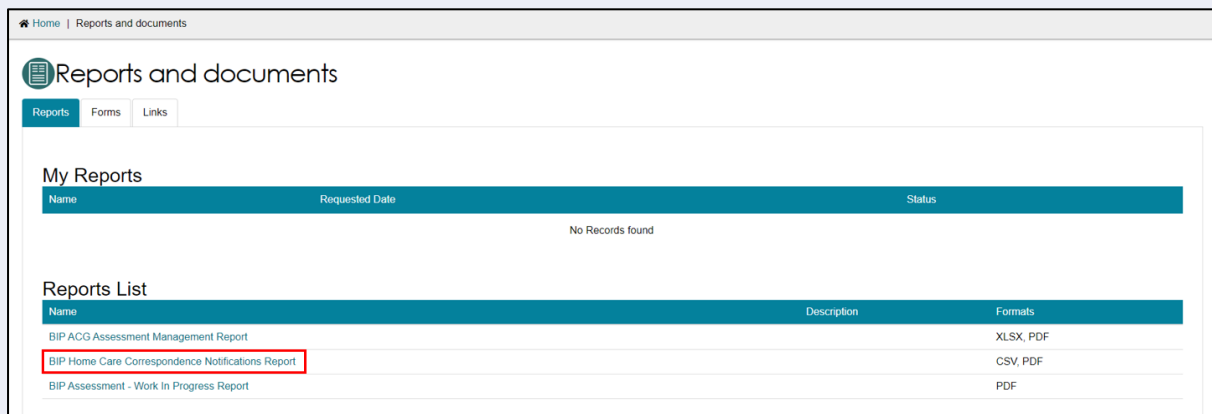
Creating Reports

Clinical assessors and assessment delegates are able to create a report at the outlet level. The report will display the list of clients who have been nominated either by clinical assessors or assessment delegates and wish to receive notifications related to Support at Home.

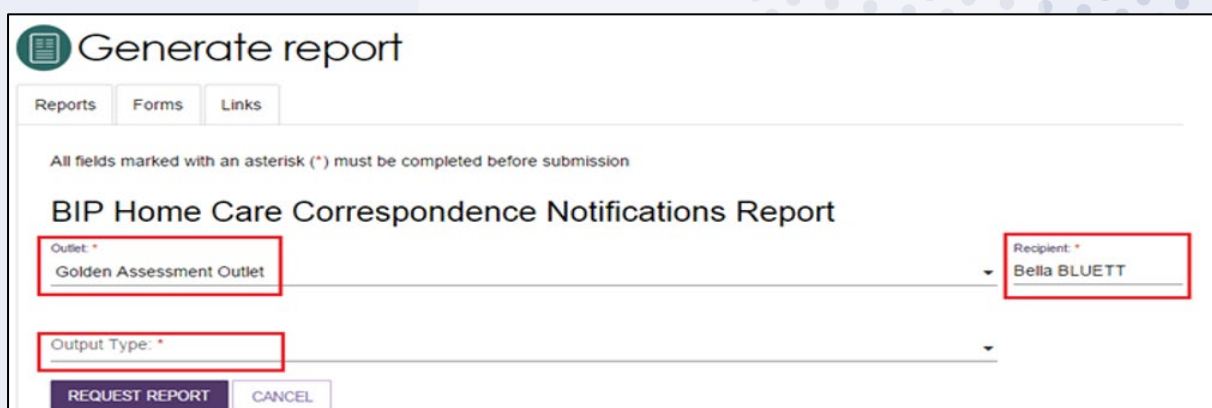
1. This report is accessed in **Reports and documents** tab.



2. Select the **BIP Home Care Correspondence Notifications Report**.



Select the **Outlet**, **Recipient** and **Output Type** being either CSV file (comma separate values) or PDF (portable document format).



Support at Home correspondence sent to clients

There are a number of letters sent to clients related to Support at Home at different stages. Copies of these letters will also be sent to their supporter/s. Full details are contained in the client letter which will typically be available within 24 hours. The letter can be accessed from the **Attachments** tab in their client record.

List of Letters

Welcome Letter – This ‘Welcome’ letter is sent to newly registered participants*. The letter confirms their registration with My Aged Care, includes their unique Aged Care Id number and provides an overview of the next steps to progress through My Aged Care and other general information to support them. It also includes a brochure, magnet and TIS factsheet.

Not eligible for assessment Notice – The letter is sent to the participant* when the participant is found not to be eligible for an assessment.

Notice of Decision (Approval) – The letter is sent to the participant* after an assessment/re-assessment/Support Plan Review has been approved. This letter may include reasons for non-approval if specific services were requested and not approved. If ongoing Support at Home (SaH) – this letter does NOT mean that funding is available immediately.

Notice of Decision (Non-Approval) – The letter is sent to the participant after the initial assessment, when the older person is not approved to access any services; or following a reassessment or Support Plan Review where the older person is not approved to access any additional services.

Restorative Care Pathway (RCP) – Approval of 2nd unit of funding – The letter is sent to the participant* when a 2nd concurrent unit for the Restorative Care Program is approved by the delegate following a Support Plan Review.

Seeking Services Confirmation – The letter is sent to the participant* as part of the funding allocation process when they previously informed the department, they are not seeking services (for whatever reason, e.g. travelling) and now decide they are ready and are put back in the priority queue.

Funding Assignment Notice – This letter is sent to the participant* when funding becomes available for them to start receiving services after approval of their assessment. This offer can either be for some of their funding (60%) or all their funding.

Withdrawal Notice – sent to the client to inform the client when the funding for their approved aged care services has been withdrawn

Extension Confirmation Notice – The letter is sent to the participant* when they requested for an extension to start services with a service provider. They will get an additional 28 days to start services with a Service Provider (SP).

Upgrade Notice – This letter is sent to the participant* when funding becomes available after their reassessment for a higher classification and they are already receiving services. This can be for part of the increase or all the increase in funding.

Funding Assignment Consecutive – This letter is sent to the participant* when funding becomes available to start receiving services after delegate approval on their reassessment and they hadn't started services from their previous assessment/reassessment.

Withdrawal Notice – The letter is sent to the participant* when funding has been withdrawn. This can occur upon entry into Permanent Residential Care, when services did not start within the required timeframe, the participant advised they do not want services or when services were not recommenced within the required timeframe after previously exiting a SP.

Reinstatement Notice – The letter is sent to the participant* when their funding is reinstated. The funding was previously withdrawn and now has been reinstated.

Referral Code Reactivation – This letter is sent to the participant* when the referral code has been reactivated via the Assessor Portal, Client Portal and Contact Centre.

Reminder to Re-enter Support at Home – This letter will be sent to the participant* 270 days from the exit date from the Service Provider (SP) to notify them that they have until x date (last quarter of SP exit + 4 quarters) before their funding is withdrawn and thus, should start services with a SP.

Remaining funds released letter – The letter will be sent to the participant* when they were accessing MSO (Minimum Funding Offer – 60%) and now the remaining funding (40%) is available to receive more services.

** All letters will also be sent to Supporters if they are authorized to receive the participants correspondence.*