

My Aged Care Assessor Portal User Guide for Residential Aged Care (RAC) Funding Assessor Team Leaders

This user guide is for RAC funding assessor team leads and describes activities that they can perform.

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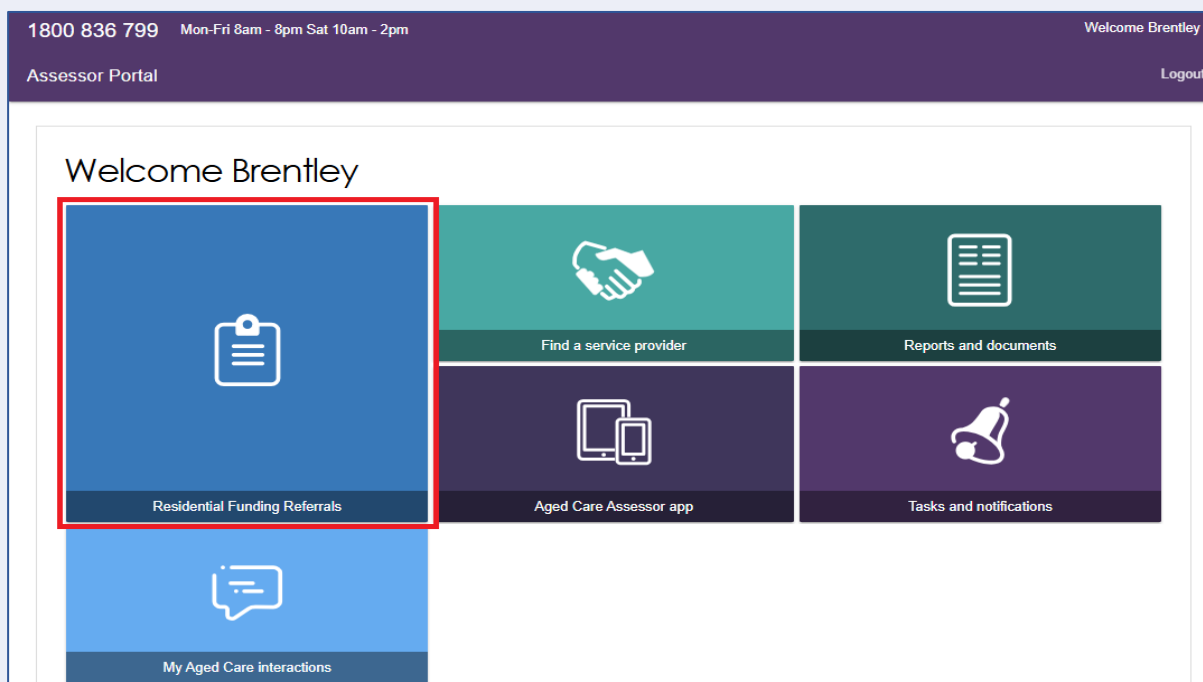
RAC Funding Assessor Functions

Users assigned the *RAC Funding Assessor* role will have the below view in the My Aged Care Assessor Portal. From here, they can view the residential aged care funding assessment (assessment) referrals they have been assigned to undertake, and the assigned referrals that have been closed. They can also accept and assign referrals.

RAC Funding Assessor Team Leads can also access the roles of the RAC Funding Assessor.

Viewing Referrals

1. Select the Residential Funding Referrals tile from the assessor portal home page.



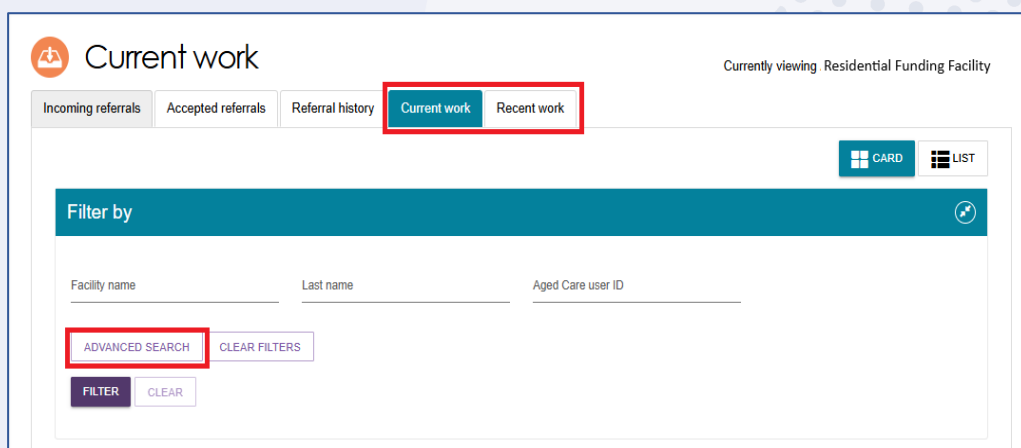
2. Select the Current work or Recent work tabs.

The **Current work** screen lists all the open referrals that are assigned to a RAC Funding Assessor.

The **Recent work** screens lists all the closed referrals that were assigned to a RAC Funding Assessor.

Users can refine these lists by using the **Filter by** and **ADVANCED SEARCH** functions.

! The Funding Assessor team lead will also have access to the Incoming Referrals, Accepted Referrals, and Referral History tabs.



- View the different referral priorities in each client card (or list) as outlined below. You can also sort them based on these priorities.

Card View:

Low: White text in a green background

Medium: Black text in a yellow background

High: Exclamation mark followed by white text, in a red background

Urgent: (for Residential Permanent Referrals only) - White exclamation mark inside a red triangle, followed by red text, in a white background.

The screenshot shows the 'Recent work' section of a web application. At the top, there are navigation tabs: 'Incoming referrals', 'Accepted referrals', 'Referral history', 'Current work', and 'Recent work' (which is selected). To the right, it says 'Currently viewing: Residential Funding Facility'. Below the tabs, there are 'CARD' and 'LIST' view options. A 'Filter by' bar is present. Below that, sorting options are shown: 'Sort by: Last Name' and 'in order of: Alphabetical (A-Z)', with a 'GO' button. The current sort order is 'Last Name'. The results show '1 to 50 out of 1803 matching results'. There are four client cards displayed:

- Benji NORRIS**: Aged 97, (17 July 1928), Male. Aged care user ID: AC11508876. Care type: Residential Permanent. Date closed: 15 March 2024. Status: Finalised. Priority: Urgent (white background with red triangle and exclamation mark).
- Baruch CLOUGH**: Aged 89, (25 July 1936), Female. Aged care user ID: AC89839823. Care type: Residential Permanent. Date closed: 31 May 2024. Status: Finalised. Priority: Medium (yellow background).
- Baruch CLOUGH**: Aged 89, (25 July 1936), Female. Aged care user ID: AC89839823. Care type: Residential Permanent. Date closed: 19 October 2023. Status: Finalised. Priority: Low (green background).
- Stephen DAY**: Aged 82, (5 April 1943), Male. Aged care user ID: AC41517905. Care type: Residential Permanent. Date closed: 8 April 2024. Status: Finalised. Priority: High (red background).

List View:

Low: Green circle

Medium: Yellow circle

High: Red circle

Urgent: White circle with a red outline.

Recent work Currently viewing Residential Funding Facility

Incoming referrals | Accepted referrals | Referral history | Current work | **Recent work**

CARD LIST

Filter by 1 to 50 out of 1803 matching results

Last name	First name	Aged Care User ID	Facility name	Locality	Care type	Status	Date closed	Priority
AARON	Shannon	AC35517564	TriCare Annerley Aged Care Residence	ANNERLEY, QLD, 4103	Residential Permanent	Finalised	28/08/2023	Low
BEAN	Rashawn	AC43700954	Pine Lodge Home for the Aged	ROCKLEA, QLD, 4106	Residential Permanent	Finalised	08/05/2024	High
AGUILAR	Abbie	AC89634190	Sinnamon Village - Reid Court	SINNAMON PARK, QLD, 4073	Residential Permanent	Finalised	11/12/2023	Medium
BENSON	Hugh	AC58061474	Dovetree	SINNAMON PARK, QLD, 4073	Residential Permanent	Finalised	18/10/2023	Urgent


Accepting Referrals

1. Select the **Residential Funding Referrals** tile from the Assessor portal home page.


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

Assessor Portal Logout


Welcome Brentley




Residential Funding Referrals




Find a service provider




Reports and documents



Aged Care Assessor app

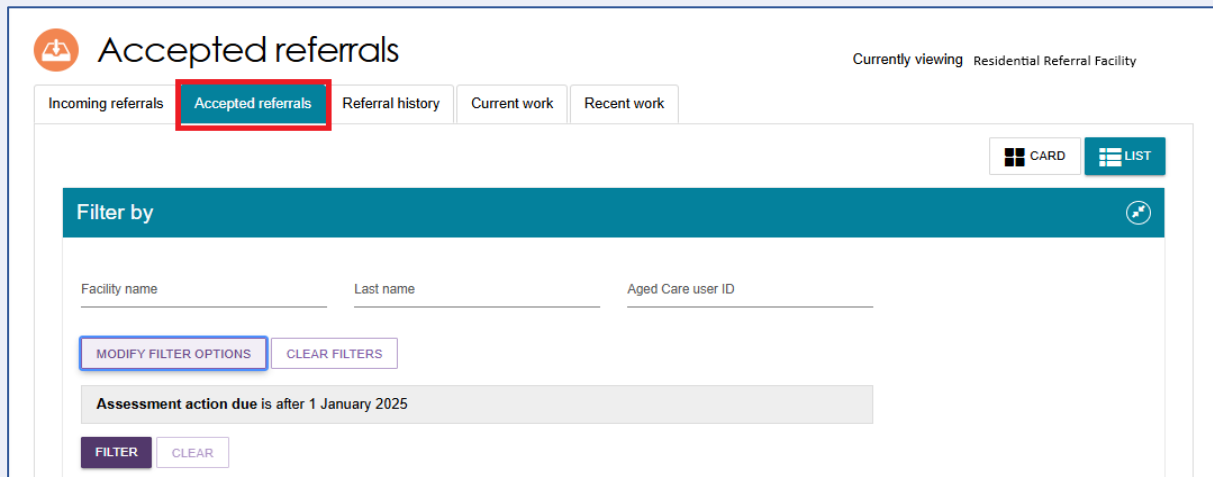


Tasks and notifications



My Aged Care interactions

2. Navigate to the **Accepted Referrals** tab. You can conduct a search or an advanced search to refine the list of accepted referrals.



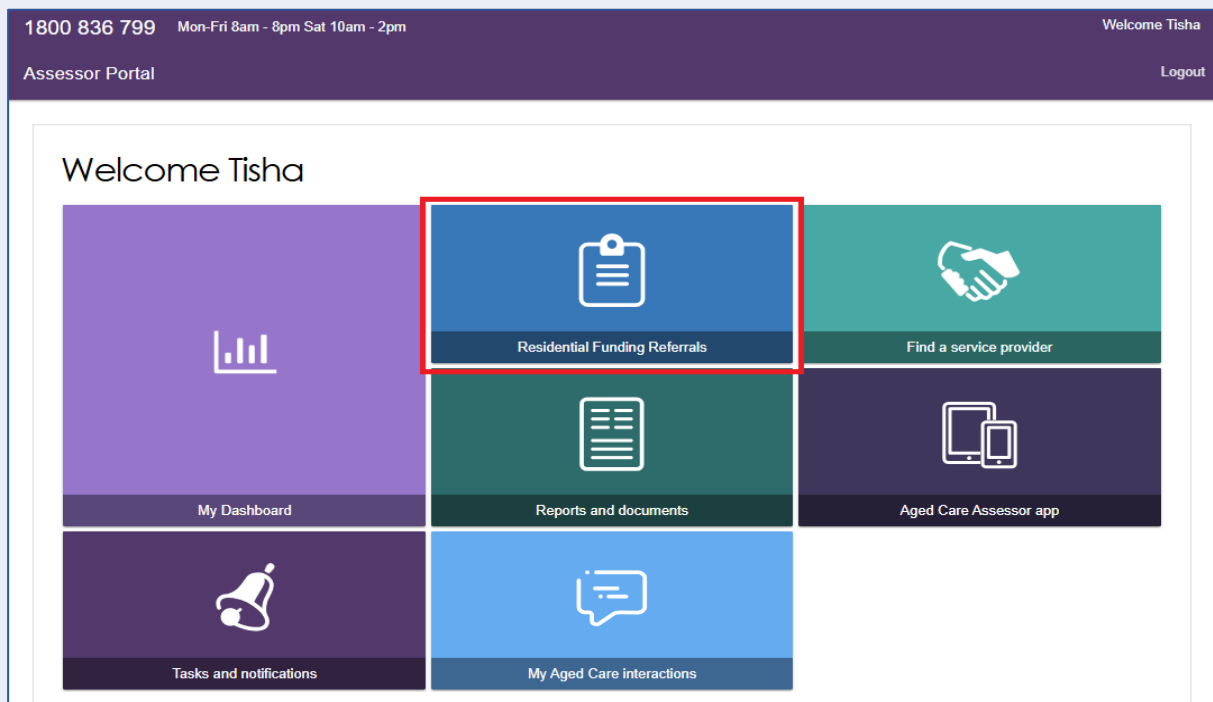
3. A pop-up will appear confirming the client/s whose referral you wish to accept. Once you have confirmed, select the **ACCEPT** button.



RAC Funding Assessor Team Lead Functions

RAC Funding team leads will have the following view in the My Aged Care Assessor Portal.

From here team leads are able to view Residential Funding Referrals, generate reports and documents, find service providers and conduct other functions in their role.



Viewing Referrals

Refer to [Viewing Referrals](#).

Accepting Assigned Referrals

Refer to [Accepting Referrals](#).

Bulk Accepting Referrals

To bulk accept referrals, select the **Incoming referrals** tab, then select the tick box next to each of the clients' names that you want to assign, then select the **ACCEPT** button. The **Select All** tickbox is also available.

The screenshot shows the 'Incoming referrals' interface. At the top, there are tabs for 'Incoming referrals', 'Accepted referrals', 'Referral history', 'Current work', and 'Recent work'. Below the tabs is a 'Filter by' search bar. A 'Select all' checkbox is highlighted with a red box. To the right, a notification says 'With 2 selected' and there are 'ACCEPT' and 'ASSIGN' buttons, also highlighted with a red box. Below this is a table with 3 rows of referrals. The 'Select' column has checkboxes for each row, with the first and third rows checked. The table columns are: Last name, First name, Aged Care User ID, Facility name, Locality, Care type, Due date, Priority, and Select.

Last name	First name	Aged Care User ID	Facility name	Locality	Care type	Due date	Priority	Select
GREEN	Bull	AC58364001	Esida Lodge	MOUNT GRAVATT EAST, QLD, 4122	Residential Permanent	19 April 2025 (180 days overdue)	High	<input checked="" type="checkbox"/>
PRIORITYT WO	Melissa	AC71064133	Esida Lodge	MOUNT GRAVATT EAST, QLD, 4122	Residential Permanent	19 April 2025 (180 days overdue)	High	<input type="checkbox"/>
CURTAIN	Blinds	AC99245151	Esida Lodge	MOUNT GRAVATT EAST, QLD, 4122	Residential Permanent	27 April 2025 (172 days overdue)	High	<input checked="" type="checkbox"/>

Assigning Referrals

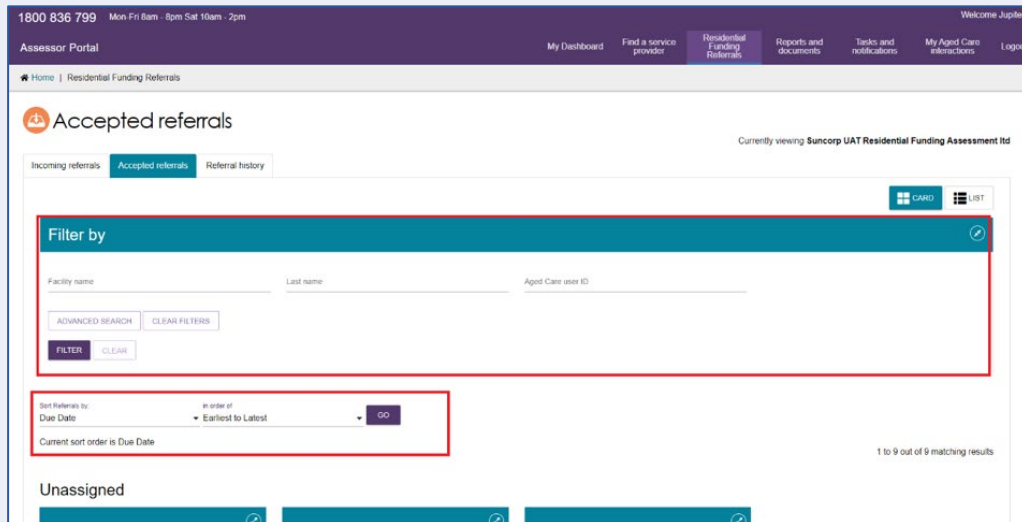
Residential Funding Team Leads can assign referrals to assessors.

1. From the Assessor portal home page, select the **Residential Funding Referrals** tile.

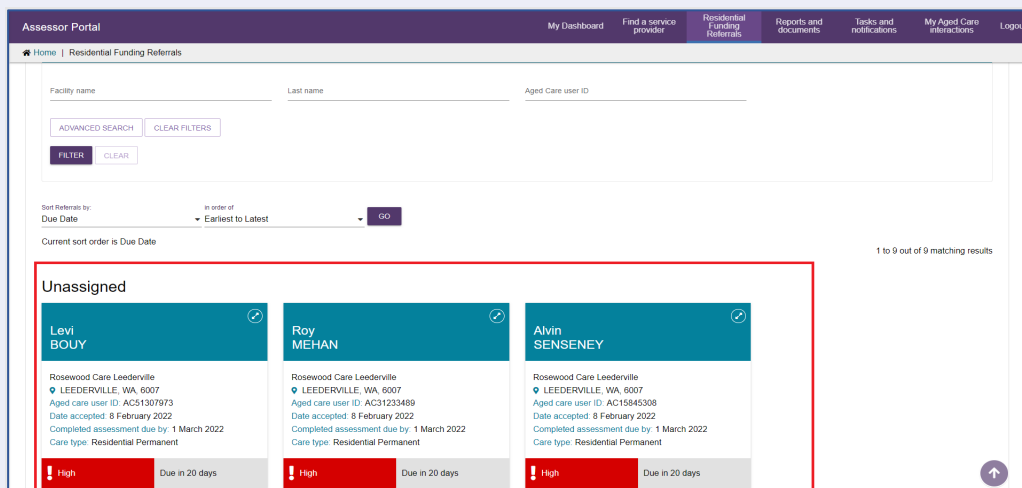
The screenshot shows the Assessor Portal home page. At the top, there is a header with the phone number '1800 836 799', the hours 'Mon-Fri 8am - 8pm Sat 10am - 2pm', and the user name 'Welcome Tisha'. Below the header is the 'Assessor Portal' title and a 'Logout' button. The main content area is a grid of tiles. The 'Residential Funding Referrals' tile is highlighted with a red box. Other tiles include 'My Dashboard', 'Reports and documents', 'Aged Care Assessor app', 'Tasks and notifications', and 'My Aged Care interactions'.

2. Navigate to the **Accepted Referrals** tab.

You can filter the list of referrals or conduct an advanced search to refine the list of unassigned referrals.



3. Select the referral you wish to assign from the unassigned list of referrals.



4. A pop-up will appear confirming the referral you wish to assign. Select the **ASSIGN** button.



- Another pop-up will appear. Select the assessor you wish to assign the referral to and select the **ASSIGN** button.

The referral will now be assigned to the assessor/s selected.

Bulk Assigning Referrals

- To bulk assign referrals, go to the Incoming referrals tab.

Select two or more checkboxes against the client card or line, then select **ASSIGN**.

The *Select all* checkbox is also available.

The text to the left of the **ASSIGN** button will show the number of clients selected. The below screenshot shows the text as 'With 2 selected'.

Last name	First name	Aged Care User ID	Facility name	Locality	Care type	Due date	Priority	Select
GREEN	Bull	AC58364001	Esida Lodge	MOUNT GRAVATT EAST, QLD, 4122	Residential Permanent	19 April 2025 (180 days overdue)	High	<input checked="" type="checkbox"/>
PRIORITYT WO	Melissa	AC71064133	Esida Lodge	MOUNT GRAVATT EAST, QLD, 4122	Residential Permanent	19 April 2025 (180 days overdue)	High	<input type="checkbox"/>
CURTAIN	Blinds	AC99245151	Esida Lodge	MOUNT GRAVATT EAST, QLD, 4122	Residential Permanent	27 April 2025 (172 days overdue)	High	<input checked="" type="checkbox"/>

- A pop up appears confirming the number of referrals being assigned for assessor assessment.

It shows the name of the client followed by information of their outlet or facility, suburb, state and postcode.

Select **CONTINUE TO ASSIGNMENT**.

Assign 3 referrals ✕

Assigning the following referrals for assessor assignment:

- AGEdmund UATMANN (UAT Pitz RESI- HCP & STRC outlet, ALTON DOWNS, QLD, 4702)
- AGBrakus UATMORTON (UAT Pitz RESI- HCP & STRC outlet, ALTON DOWNS, QLD, 4702)
- Olliver LONG (Woodcroft Retirement Home, WOODCROFT, SA, 5162)

CONTINUE TO ASSIGNMENT
CANCEL

3. Another pop up lists available assessor/s, and how many referrals they are assigned already. Select an assessor, then select **ASSIGN** or **ACCEPT AND ASSIGN ASSESSOR LATER**.

Assign 3 referrals ✕

Select an assessor to assign the referrals to *:

Iain Lilley (2 referrals assigned)
 Kasen Stutzman (0 referrals assigned)
 Mark Wilson (0 referrals assigned)

ASSIGN
ACCEPT AND ASSIGN ASSESSOR LATER
CANCEL

Rejecting Referrals






RAC funding team leads are able to reject referrals that are both incoming and assigned.

1. From the Assessor portal home page, select the **Residential Funding Referrals** tile.

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

Assessor Portal Logout

Welcome Tisha

 My Dashboard	 Residential Funding Referrals	 Find a service provider
 Reports and documents	 Aged Care Assessor app	

2. Select the referral you wish to reject.

The screenshot shows the 'Residential Funding Referrals' page in the Assessor Portal. At the top, there are navigation tabs: My Dashboard, Find a service provider, Residential Funding Referrals (active), Reports and documents, Tasks and notifications, My Aged Care interactions, and Logout. Below the navigation is a 'Filter by' section with a 'Select all' checkbox and a sort order dropdown set to 'Due Date' with a 'GO' button. The main content area displays a list of referrals for 'Rosewood Care Leederville'. The first referral, 'Emil, LUDLUM', is highlighted with a red box. Other referrals include Mack, DAMION; Jacob, DAMION; Leon, CONLAN; Will, MEIGGS; Richard, MONFORE; Claude, MEHAN; and Weslev, CRAYFORD. Each referral card shows the client's name, aged care user ID, date issued, action referral due by date, care type, and a status indicator (High) with a '5 days overdue' warning.

3. A pop-up will appear.

Confirm this is the referral you wish to reject, and select the **REJECT** button.

The screenshot shows a pop-up window titled 'Emil, LUDLUM'. It contains the following information: 'Aged 76 (29 November 1945), Female', 'Referred from Department of Health on 1 February 2022', 'Facility details: Rosewood Care Leederville, 5 BRITANNIA Road LEEDERVILLE WA 6007', 'Care Type: Residential Permanent', and 'Action referral due by: 4 February 2022'. At the bottom, there are two buttons: 'VIEW CLIENT RECORD' and 'VIEW CLIENT REPORT'. Below these are two buttons: 'ACCEPT' and 'REJECT', with the 'REJECT' button highlighted by a red box.

4. Another pop-up will appear.

Select the reason for the referral rejection and provide details in the free text field.

Once complete, select the **REJECT** button.

The screenshot shows a pop-up window titled 'Reject this referral for Emil Ludlum'. It contains the following information: 'Rosewood Care Leederville, LEEDERVILLE, WA, 6007', 'All fields marked with an asterisk (*) must be completed before submission', and 'Select rejection reason *'. Below this is a list of radio button options: 'Client Unavailable', 'Client Deceased', 'Outlet Insufficient Capacity', and 'Other'. The 'Client Unavailable' option is highlighted with a red box. Below the list is a text input field labeled 'Details:' with a character count of '0 / 500'. At the bottom right, there are two buttons: 'REJECT' and 'CANCEL', with the 'REJECT' button highlighted by a red box.

Transferring Referrals

Both departmental staff and RAC Funding Assessor Team Leads can transfer **Residential Permanent** referrals between Assessment Outlets (Assessment Organisations) without needing to recall the referrals first.

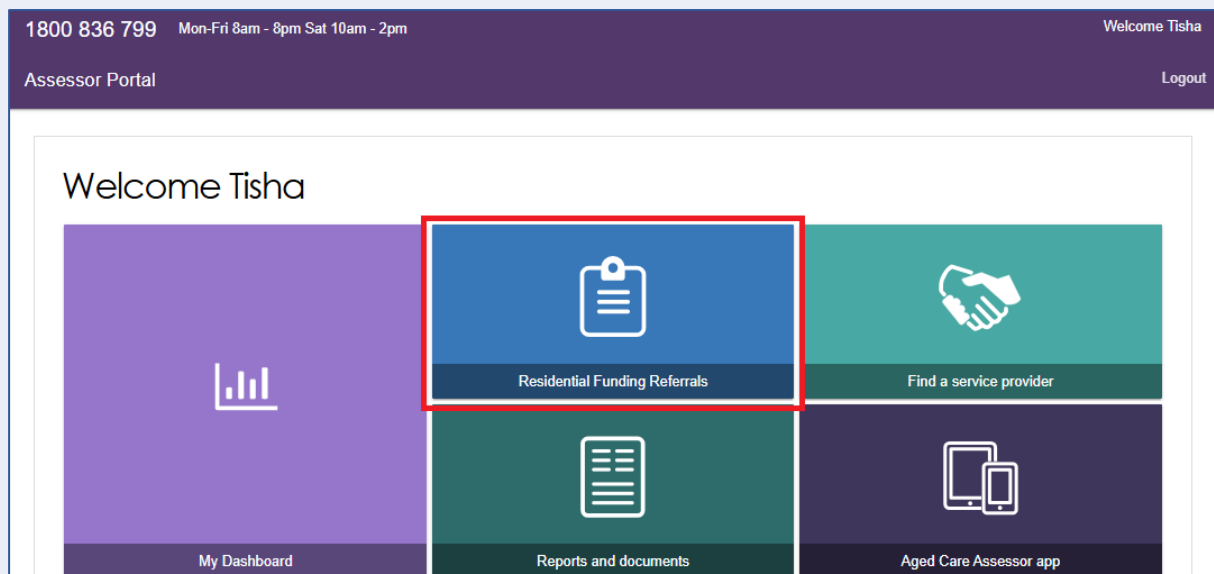
! RAC funding team leads can transfer a new referral where an unrestricted assessment is not in progress, in the case their outlet/organisation unexpectedly does not have the capacity to accept the referral.

For example, the outlet/organisation has received an urgent referral but does not have any assessors available to complete the referral in the required timeframe.

Prior to completing the transfer, the Team Lead must contact the organisation they want to transfer the referral to and confirm they have the capacity and are willing to accept the referral.

(The receiving organisation must be in the same ACPR - Aged Care Planning Region).

1. In the Assessor Portal, go to the **Residential Funding Referrals** tile.



- Go to the **Accepted Referrals** tab and select a care recipient by expanding the client card or listing.

CARD VIEW

LIST VIEW

Last name	First name	Aged Care User ID	Facility name	Locality	Care type	Due date	Priority	Select
ELSPETH	Elda	AC12345678	Aussie Healthcare	KEMPSEY, NSW, 2440	Residential Permanent	5 October 2025 (253 days overdue)	High	<input type="checkbox"/>
LEE	Isela	AC09876543	Aussie Healthcare	KEMPSEY, NSW, 2440	Residential Permanent	5 October 2025 (253 days overdue)	High	<input type="checkbox"/>
MACGUY	Kama	AC87655677	Aussie Healthcare	KEMPSEY, NSW, 2440	Residential Permanent	5 October 2025 (253 days overdue)	High	<input type="checkbox"/>
GUIGAN	Salvatore	AC96757293	ABC Facility	FORSTER, NSW, 2428	Residential Permanent	5 October 2025 (253 days overdue)	Low	<input type="checkbox"/>

- The client's card pop up, or listing, appears. Select the **TRANSFER** Button.

Note: Only Residential Permanent clients have the Transfer option available.

If an assessor has already started an assessment on this client, there will be a red error banner and the transfer will be disabled.

CARD VIEW



Accepted referrals Currently viewing Residential Funding Facility

Incoming referrals **Accepted referrals** Referral history Current work Recent work

GARD **LIST**

Filter by 1 to 50 out of 201 matching results

Last name	First name	Aged Care User ID	Facility name	Locality	Care type	Due date	Assigned to	Priority
GINGERL CH	Fox	AC0637135 5	Regis Wynnum	WYNNUM WEST, QLD, 4178	Residential Permanent	12 July 2024 (461 days overdue)		Low

Aged 89, (11 June 1936), Female Referred from Department of Health on 14 June 2024

Facility details
Regis Wynnum
261 Preston Road WYNNUM WEST QLD 4178 Care Type: Residential Permanent
Action referral due by: 12 July 2024

VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

ASSIGN REJECT **TRANSFER**

4. The **Transfer this referral** page appears.

Fill in all mandatory fields denoted with a red asterix.

This includes the assessment organisation, reason for transferring, etc.

A reminder banner appears to remind you that before you transfer, to confirm with the Assessment Organisation that you want to refer the client to.

i Before you transfer, confirm with the Assessment Organisation you want to refer the client to.

Then, select **TRANSFER**.

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

Assessor Portal My Dashboard Find a service provider Residential Funding Referrals Reports and Documents Tasks and notifications My Aged Care

Home | Residential Funding Referrals | Transfer

Transfer this referral for Michael Jordan

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

Select Assessment Organisation: *

ACT RF East, CITY, Ph 02 6145 8124

ACT RF South, WODEN, Ph 02 6145 8346

Reason: *

This client requires urgent attention 37/250

TRANSFER CANCEL

i Before you transfer, confirm with the Assessment Organisation you want to refer the client to

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! If there are no assessment organisations in the same Aged Care Planning Region, then the transfer pop-up will appear with No matching results found.

In this case, the **TRANSFER** button will be disabled, and you must contact the Department to transfer the referral for you.

Home | Residential Funding Referrals | Transfer Referrals

Transfer this referral for Scott GRACE

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

Select an Assessment Organisation.*

No matching results found

TRANSFER CANCEL

5. Transferred referrals will appear in **Referral History** tab.

The client card will show a Rejected status, and a reason of Transferred.

Michael JORDAN

Aged 88, (15 January 1931), Male

Referral details

Care type: Residential Permanent

Action referral due by:

Referred from: Assessor on 30 April 2021

Client Story
No client story was recorded

Client Notes
No client notes were recorded

Referral Status Reason: Rejected

Referral Status Description: Transferred

VIEW CLIENT RECORD VIEW CLIENT REPORT

The receiving assessment organisation will be able to view the referral in their incoming referrals.

Your transfer comments will then be visible to the receiving assessment organisation.

Michael JORDAN

Aged 88, (15 January 1931), Male

Referral details

Care type: Residential Permanent

Action referral due by:

Referred from: Assessor on 30 April 2021

Client Story
No client story was recorded

Client Notes
No client notes were recorded

Transfer Reason: Other

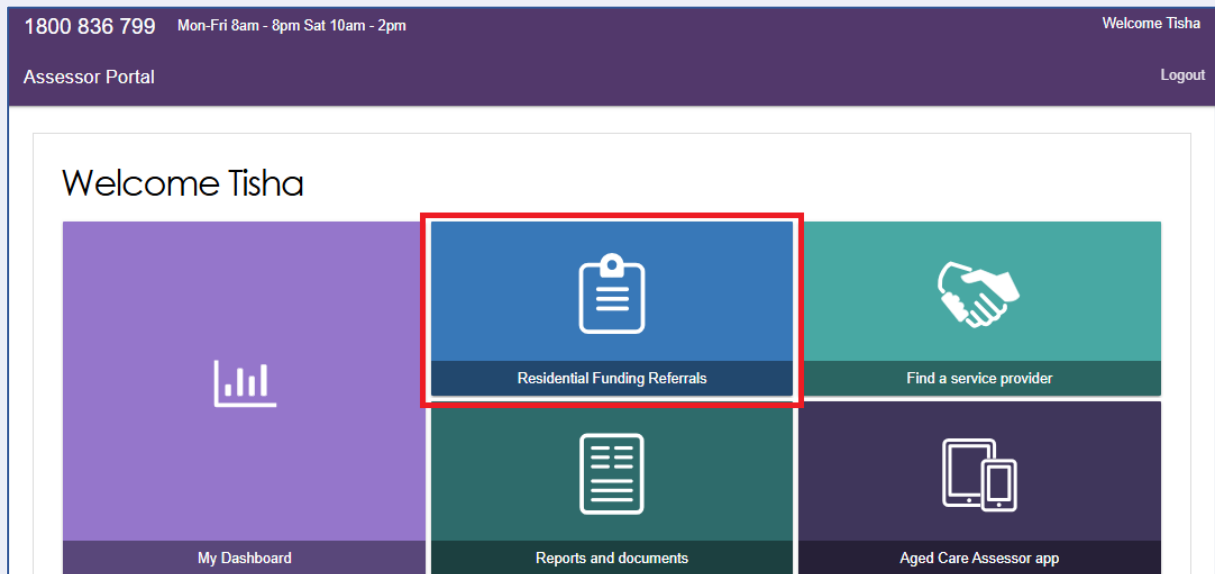
Transfer Comments: We need someone else to take this assessment

VIEW CLIENT RECORD VIEW CLIENT REPORT

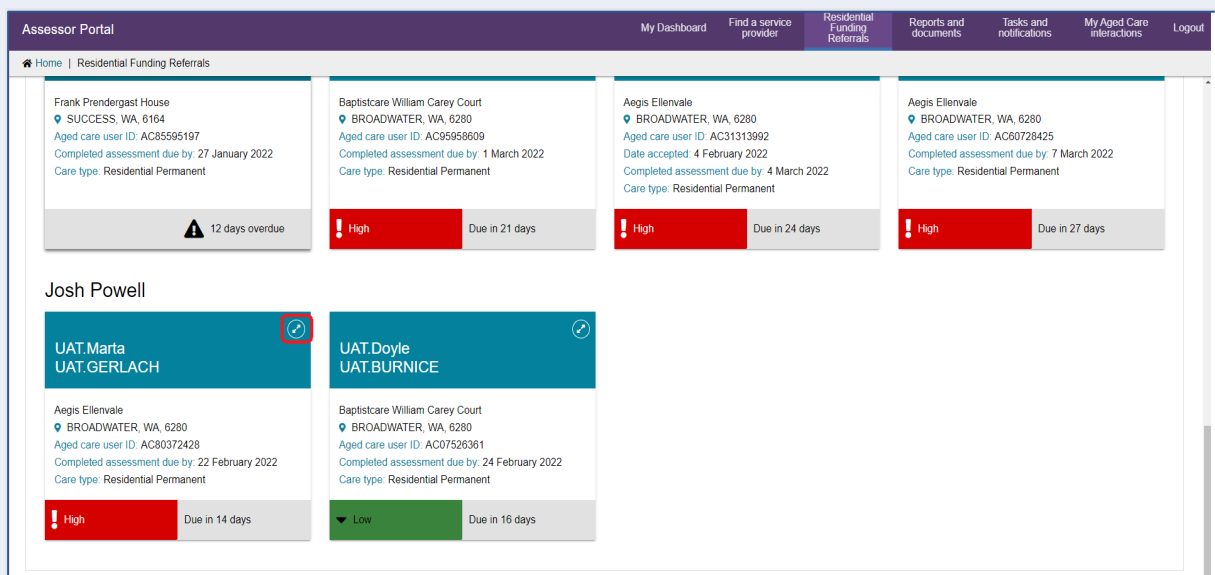
Reassigning Referrals

RAC funding team leads can re-assign referrals that have been assigned to assessors.

1. From the Assessor portal home page, select the **Residential Funding Referrals** tile.



2. Navigate to the **Accepted Referrals** tab. You can search for the referral you wish to re-assign or scroll to the assessors' referrals that you wish to re-assign.



3. A pop-up will appear.
Select the **REASSIGN** button.

UAT.Marta
UAT.GERLACH

Aged 75 (6 September 1946), Male

Facility details
Aegis Ellenvale
Cnr Broadwater Blvd & Bell Dr BROADWATER WA 6280

Referred from Department of Health on
25 January 2022


Care Type: **Residential Permanent**

Completed assessment due by: **22 February 2022**

Assigned to: **Josh Powell**

4. Another pop-up will appear.
Select the assessor you wish to re-assign the referral to and select the **REASSIGN** button.

Re-assign this referral for UAT.Marta UAT.Gerlach

 "Re-assigning this referral will result in the cancellation of any assessments that have been started in offline mode. Please confirm with the assigned assessor that they have not completed the assessment prior to re-assigning the referral."

Aegis Ellenvale, BROADWATER, WA, 6280

Residential Funding Referral, currently assigned to Assessor **Josh Powell**

Select an assessor to re-assign this referral to *

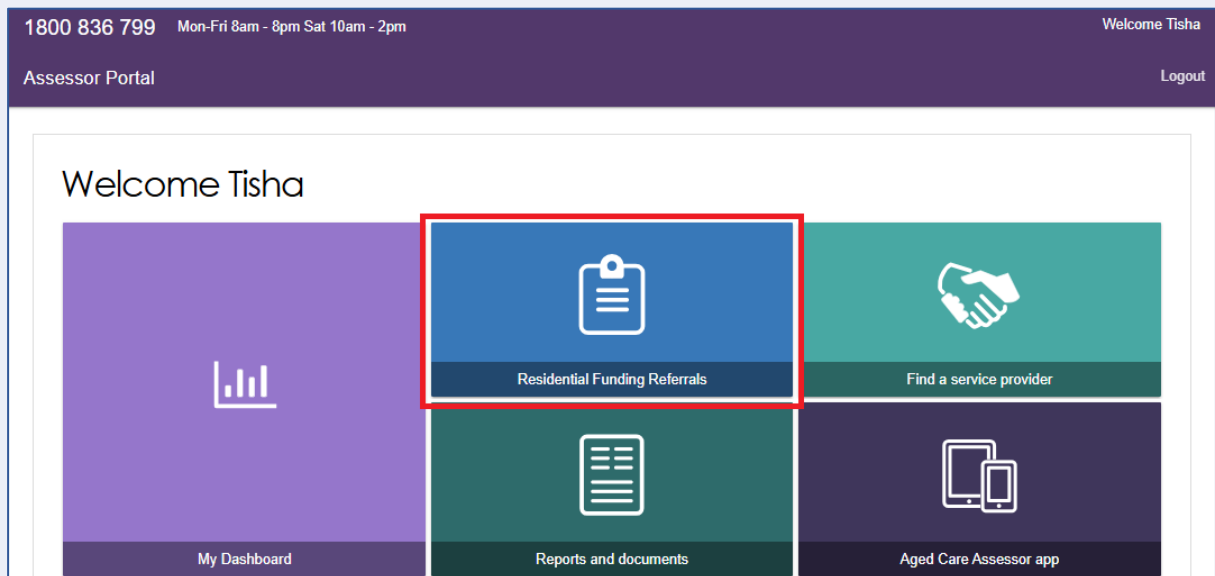
Orth Lora (4 referrals assigned,3 referrals assigned in postcode 6280)

Melissa Powell (0 referrals assigned,0 referrals assigned in postcode 6280)

Viewing historical Residential Funding Referrals

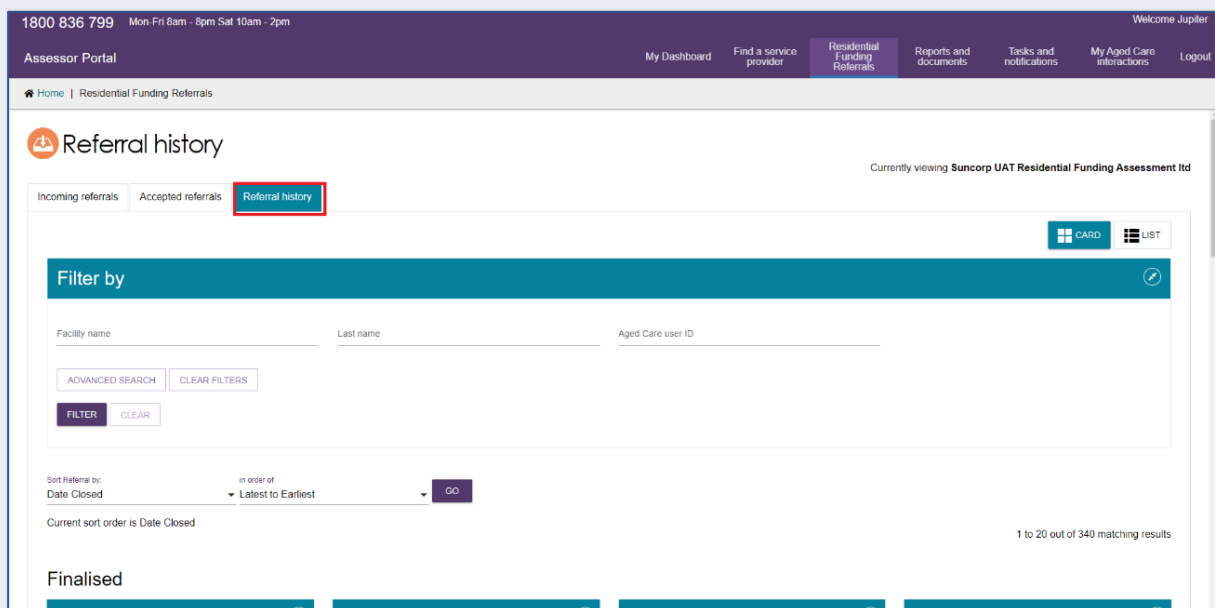
RAC Funding team leads can view historical Residential Funding Referrals for their organisation or outlet.

1. From the Assessor portal home page, select the **Residential Funding Referrals** tile.



2. Navigate to the **Referral History** tab.

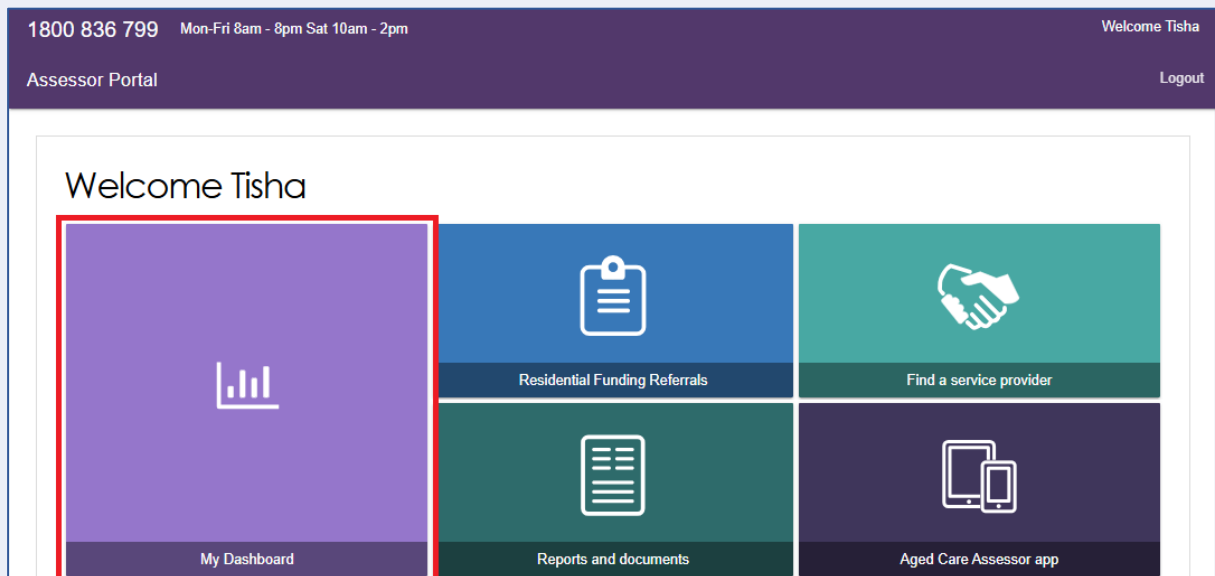
You can either search or filter the list of referrals, or scroll down to see the finalised referrals for your outlet/organisation.



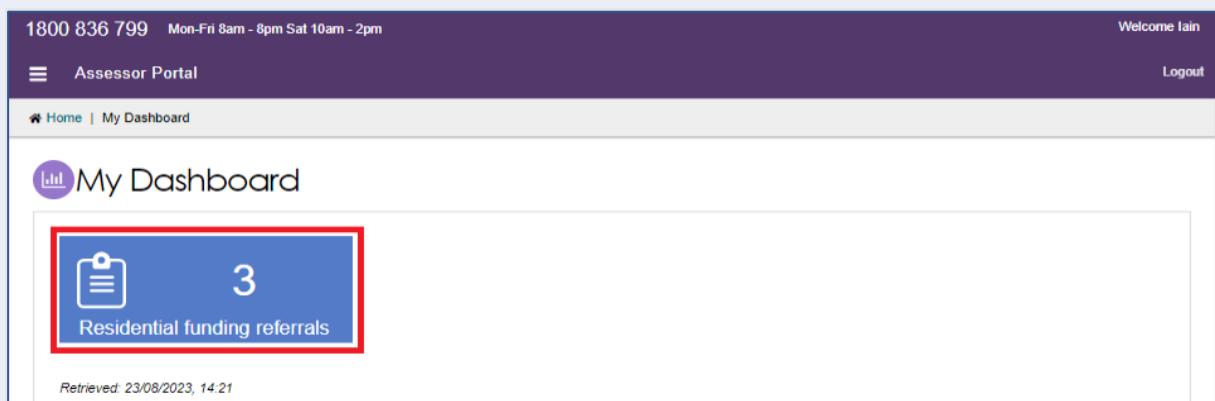
Viewing progress of Residential funding assessments

RAC Funding Team leads are able to view the progress of RAC Funding Assessments for their outlet or organisation.

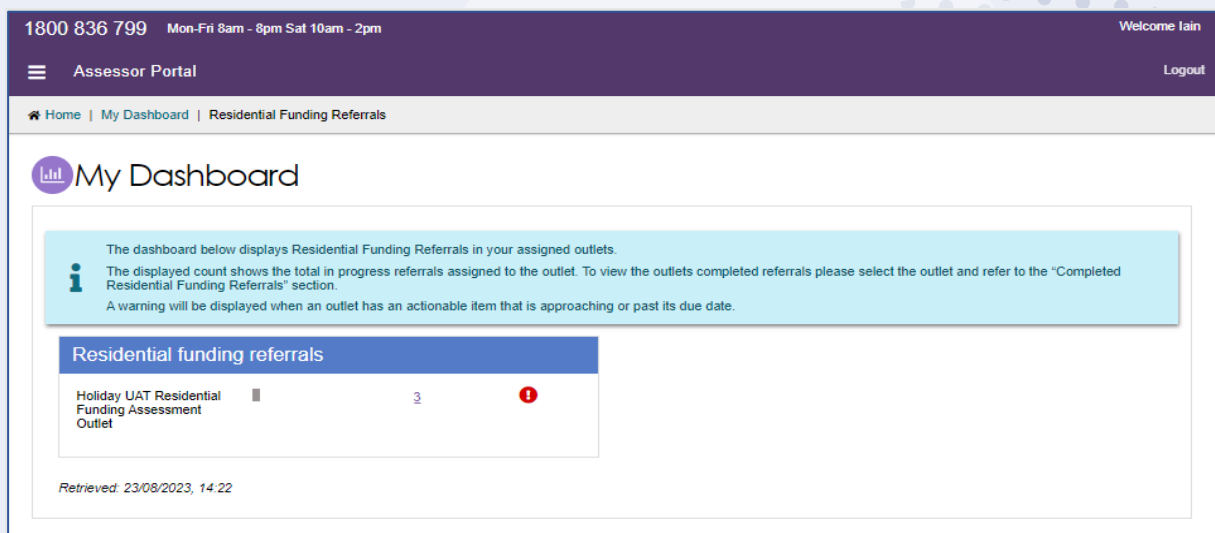
1. From the Assessor portal home page, select the **My Dashboard** tile.



2. Select the blue **Residential funding referrals** tile.



3. You will now be able to see an overview of the **Residential Funding Referrals** for your organisation/outlet.

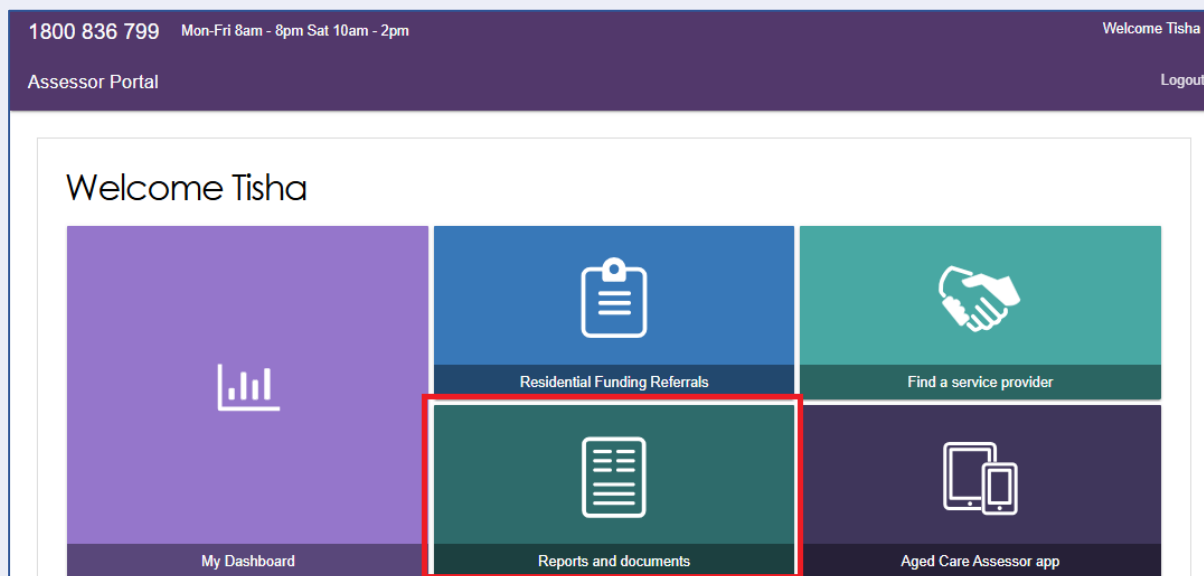


Generating a Training or Quality Assurance Assessment Report

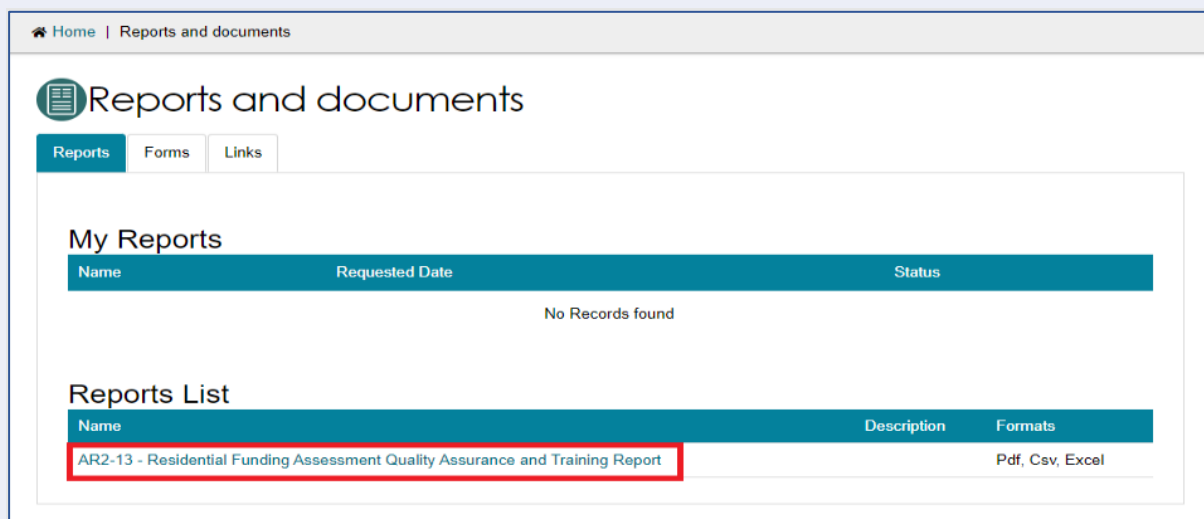
RAC funding team leads can monitor when an unrestricted assessor last participated in a Quality Assurance assessment. The results of Quality Assurance and Training assessments can also be compared to improve the quality of assessments as required.

To view these reports, follow the below steps:

1. From the home page of the Assessor portal, select the **Reports and Documents** tile.



2. Select the hyperlink for the **AR-2-13 – Residential Funding Assessment Quality Assurance and Training Report**.



3. Fill in all the mandatory fields.

You must select whether you would like a report for **Quality Assurance** or **Training Assessments** and choose the output type of the report (PDF, CSV or Excel).

Select **Request Report** button.

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

Assessor Portal My Dashboard Find a service provider Residential Funding Referrals Reports and documents Tasks and notifications My Aged Care interactions Logout

Home | Reports

Generate report

Reports Forms Links

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

AR2-13 - Residential Funding Assessment Quality Assurance and Training Report

Outlet name *
Suncorp UAT Residential Funding Assessment Ltd Residential Funding Assessor: +

Assessment date From *
16/02/2022

Assessment date To *
15/02/2022

Quality Assurance or Training *
Quality Assurance

Show discrepancies only: -

Output Type *
Pdf

REQUEST REPORT CANCEL

4. A report will be generated that you will be able to download and view.

The example below is a Quality Assurance report for one outlet in PDF format.

Australian Government myagedcare OFFICIAL USE ONLY Not for public distribution

RFA Quality Assurance Report

Name of Outlet: Holiday UAT Residential Funding Assessment Outlet

Assessor Summary
No Data Available

Assessor Detail
No Data Available

Report Run: 23/08/2023 2:28:36 PM By: BL HF56947D Data Current as at: 11/08/2023 5:21:19 PM Page: 1

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