

Service and Support Portal User Guide - Managing Referrals for Service

This User Guide is designed for Team Leaders within the My Aged Care Service and Support Portal and describes the procedures for managing referrals.

Each provider outlet needs at least one person assigned the 'Team Leader' role in the portal.

This person will be responsible for managing referrals for service (accepting, accepting to waitlist, rejecting referrals and revoking referrals after acceptance) within the portal.

Table of Contents

| | |
|---|----|
| Introduction | 2 |
| Viewing Referrals | 2 |
| Accepting or Rejecting a Referral for Service | 7 |
| Accepting a Referral | 11 |
| Rejecting a Referral | 14 |
| Revoking a Referral After Acceptance | 17 |
| Revoking a Referral - Client Deceased | 20 |
| Accepting a Referral to Waitlist | 21 |
| Retrieving a Referral Code | 22 |
| Drawing a Client into Service from a Waitlist | 24 |
| Notifications for Overdue Referrals | 26 |
| Referral History | 27 |
| Referral Priority Status | 28 |
| More Information and Support | 28 |

Introduction

Service Providers may receive referrals from clients for services via four different pathways:

- Clients with existing approvals for care types under the *Aged Care Act 2024* can approach service providers directly. These clients may not be registered with My Aged Care.
- Providers can receive electronic referrals for service via the Portal.
- Clients can approach providers directly with a referral code issued by assessors or the My Aged Care contact centre; or
- Providers can accept electronic referrals to their waitlist, if a waitlist is available.

These pathways are described in detail in this guide.

For further detail regarding the procedures for managing referrals, please refer to the [My Aged Care Service and Support Portal user guide: Part 2 - Team leader and staff member functions](#).

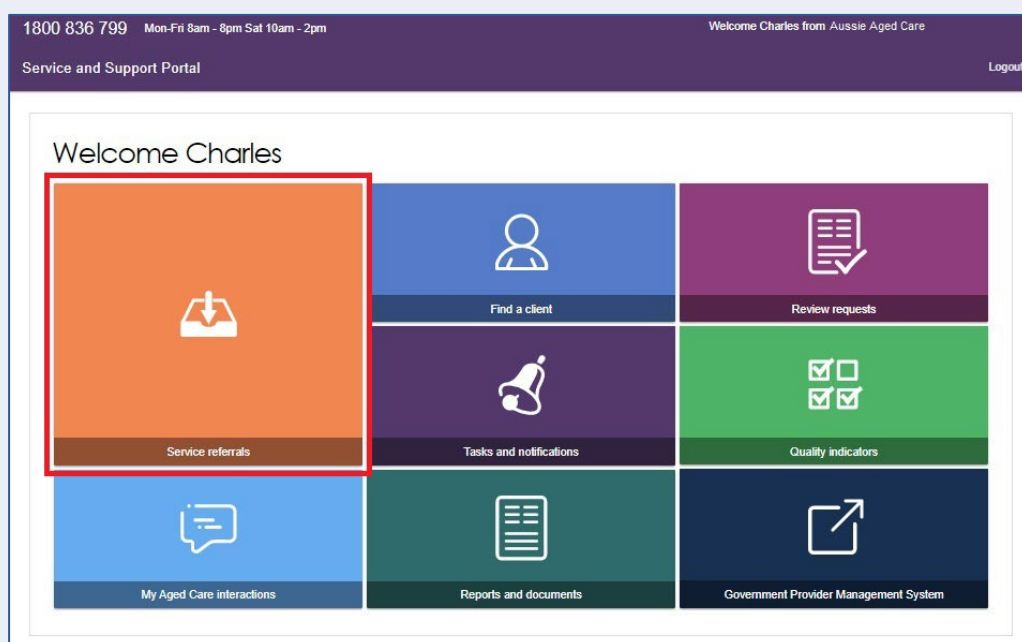
! Referrals for service mentioned in this guide are for Support at Home referrals, which may include multiple service types and services (excluding self-referrals). Providers either receive referrals electronically or via a referral code, depending on the client's preferences, and incoming referrals have a priority status (low, medium, high).

! All clients with existing approvals should be registered in My Aged Care. Please contact the My Aged Care Assessor and Service Provider helpline on 1800 836 799 for further assistance.

Viewing Referrals

To view referrals and search for a particular client:

1. Select **Service referrals** from the homepage.

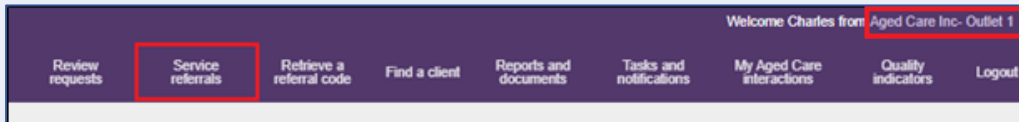


Team Leaders and Staff Members can view referrals, however only Team Leaders can accept, accept to waitlist, and reject referrals or revoke referrals after acceptance. You may have multiple roles within the provider portal.

Your homepage will display different tiles depending on the role(s) you are assigned.

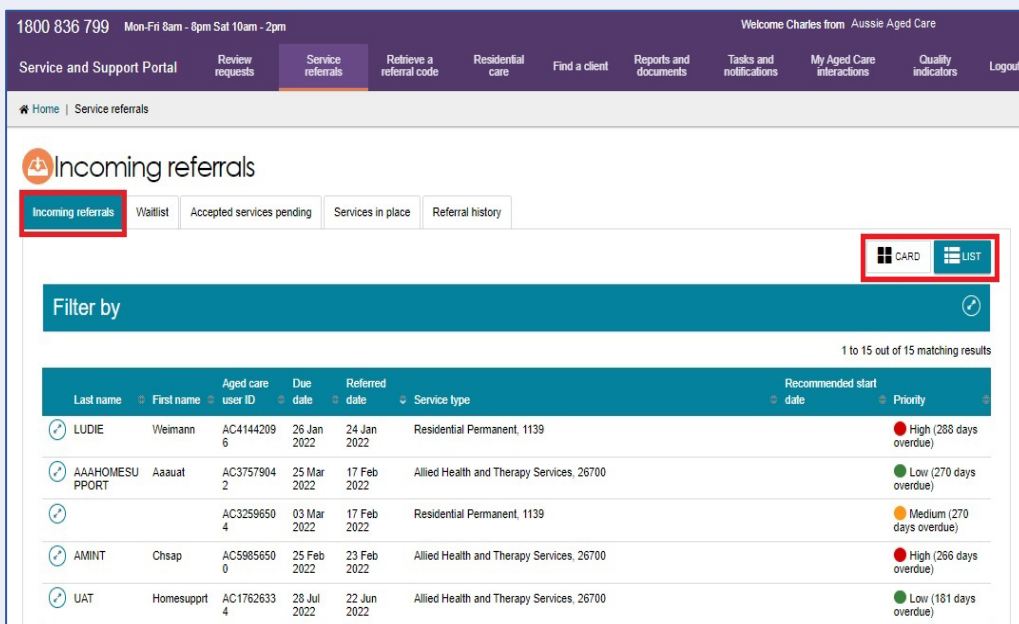
Alternatively, from any other page in the Service and Support portal, you can choose the **Service referrals** option from the tool bar displayed at the top of the portal.

You will need to select the relevant outlet name to ensure that you are looking for referrals in the correct outlet. This can be done by selecting the outlet name from the top right corner of the portal, next to the **Logout** link.



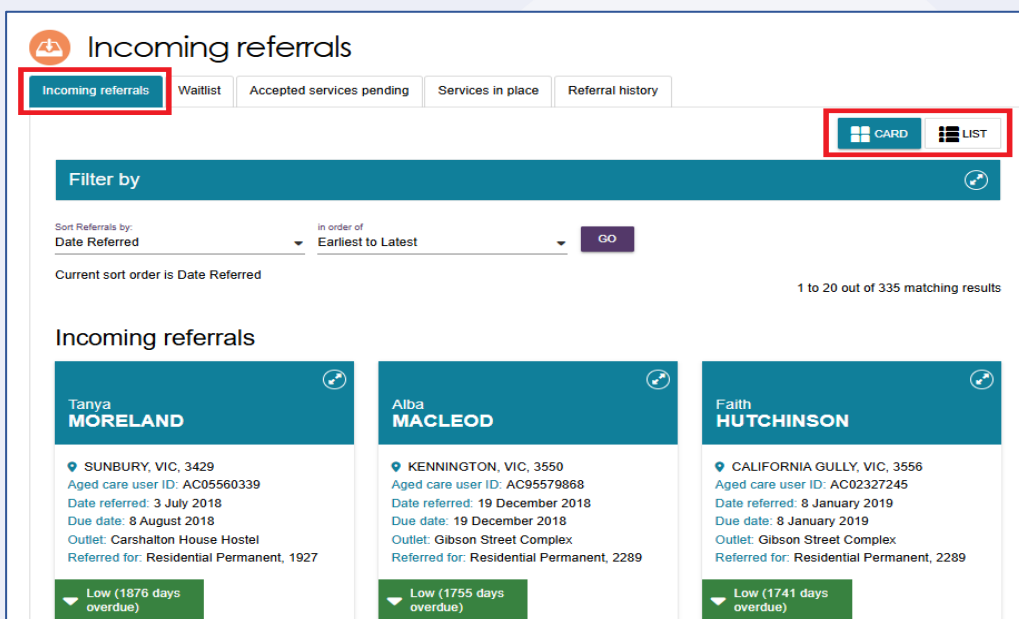
2. The **Incoming referrals** page will now display a list of incoming referrals (those that have not been actioned). You can alternate between card and list view by using the toggle at the top of the page.

LIST VIEW



| Last name | First name | Aged care user ID | Due date | Referred date | Service type | Recommended start date | Priority |
|-----------------|------------|-------------------|-------------|---------------|---|------------------------|---------------------------|
| LUDIE | Weimann | AC41442096 | 26 Jan 2022 | 24 Jan 2022 | Residential Permanent, 1139 | | High (288 days overdue) |
| AAAHOMESU PPORT | Aaaut | AC37579042 | 25 Mar 2022 | 17 Feb 2022 | Allied Health and Therapy Services, 26700 | | Low (270 days overdue) |
| | | AC32596504 | 03 Mar 2022 | 17 Feb 2022 | Residential Permanent, 1139 | | Medium (270 days overdue) |
| AMINT | Chsap | AC59856500 | 25 Feb 2022 | 23 Feb 2022 | Allied Health and Therapy Services, 26700 | | High (266 days overdue) |
| UAT | Homesupprt | AC17626334 | 26 Jul 2022 | 22 Jun 2022 | Allied Health and Therapy Services, 26700 | | Low (181 days overdue) |

CARD VIEW



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

Current sort order is Date Referred

1 to 20 out of 335 matching results

Incoming referrals

Tanya MORELAND

SUNBURY, VIC, 3429
Aged care user ID: AC05560339
Date referred: 3 July 2018
Due date: 8 August 2018
Outlet: Carshalton House Hostel
Referred for: Residential Permanent, 1927

Low (1876 days overdue)

Alba MACLEOD

KENNINGTON, VIC, 3550
Aged care user ID: AC95579868
Date referred: 19 December 2018
Due date: 19 December 2018
Outlet: Gibson Street Complex
Referred for: Residential Permanent, 2289

Low (1755 days overdue)

Faith HUTCHINSON

CALIFORNIA GULLY, VIC, 3556
Aged care user ID: AC02327245
Date referred: 8 January 2019
Due date: 8 January 2019
Outlet: Gibson Street Complex
Referred for: Residential Permanent, 2289

Low (1741 days overdue)



3. Select the Expander icon in Card or List view next to each person's listing, to display more information about the referral.

In the case of Support at Home services, If the client has more than one Support at Home classification assigned or approved, they will all be listed in the expanded Card or List view, along with their funding status.

4. You can refine the search results by entering a client's **First name, Last name, or Aged Care User ID**.

You can show the filter option by clicking the double arrows (expander) icon at the right of the filter bar.

You can use the **Advanced search** button to expand search parameters.

The **Search incoming referrals pop** up then displays.

The following search filters can be chosen from the **Optional Filter Field** drop down box and applied to your search by clicking **Add Filter**.

You can save any filters that have been applied by selecting **Save filter**, so that they may be quickly used again through the **Advanced search** option.

- Aged Care User ID
- Due date
- First name
- Last name
- Locality
- Outlet
- Postcode
- Priority
- Recommended start date
- Referred date
- Service type
- State
- Suburb.

Search incoming referrals

Incoming referrals

Choose an item. **ADD FILTER** **SAVE FILTER** **CLEAR FILTER**

Choose an item.

- Aged Care user ID
- Due date
- First name
- Last name
- Locality
- Outlet
- Postcode
- Priority
- Recommended start date
- Referred date
- Referred for
- State
- Suburb

FILTER **CANCEL**

When finished, select **Filter**.

Search incoming referrals

Incoming referrals

ADD FILTER SAVE FILTER CLEAR FILTER

2 of 7 filters used

Last name Postcode

FILTER CANCEL

Alternatively, these referrals can also be sorted by the following fields, in either ascending/descending or alphabetical A-Z/Z-A:

- Client Last Name
- Client First Name
- Aged Care User ID
- Suburb
- State
- Postcode
- Locality
- Date Referred
- Due Date
- Recommended Start Date
- Priority
- Service Type.

Incoming referrals

Incoming referrals Waitlist Accepted services pending Services in place Referral history

CARD LIST

Filter by

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

Current sort order is Date Referred

Accepting or Rejecting a Referral for Service

To accept a referral for service, select **Service referrals** from the home page, the toolbar at the top of the portal, or the side-bar from the Menu option at the top left of the portal and follow the procedure below.

For Support at Home services, once funding has been assigned, providers can view the provision of a referral code to the client. Providers should note the take up deadline by which they must have commenced services with a client, or else funding will be withdrawn.

! Referrals for waitlists are no longer sent as a specific waitlist referral. If a waitlist is available for the service the client has been referred to, a team leader can accept the referral to start service immediately or accept the referral to waitlist.

1. From the Incoming referrals tab in Service referrals select the expanding arrows at the top right of the referral in card view, that you wish to view to display information about the referral.

Incoming referrals

Ian DONNELLY
WESTON, ACT, 2611
Aged care user ID: AC85126431
Date referred: 22 August 2025
Due date: 25 August 2025
Outlet: Aussie Healthcare - Support At Home
Referred for: Support at Home, 1265
Low (13 days overdue)

Long NOSE
BRADDON, ACT, 2612
Aged care user ID: AC25651589
Date referred: 5 June 2025
Due date: 7 June 2025
Outlet: Aussie Healthcare - Support At Home
Referred for: Short-Term Restorative Care, 27636
High (69 days overdue)

Or in list view, select the expanding arrows to the left.

Incoming referrals

Incoming referrals | Waitlist | Accepted services pending | Services in place | Referral history

CARD LIST

Filter by

1 to 50 out of 335 matching results

| Last name | First name | Aged care user ID | Due date | Referred date | Referred for | Recommended start date | Priority |
|-----------|------------|-------------------|-------------|---------------|--|------------------------|------------------------|
| DONNELLY | Ian | AC85126431 | 25 Aug 2025 | 22 Aug 2025 | Support at Home, 1265 | | Low (13 days overdue) |
| NOSE | Long | AC25651589 | 07 Jun 2025 | 05 Jun 2025 | Short-Term Restorative Care, 27636 | | High (69 days overdue) |
| NOSE | Long | AC25651589 | 11 Jul 2025 | 05 Jun 2025 | Domestic assistance, 25236: General house cleaning | | Low (69 days overdue) |

The expanded information will provide, in addition to what was already visible, the NAPS Service ID that the referral was issued to, any referral comments made by the assessor or contact centre, and whether or not the client has multiple referrals for additional service types to your outlet.

You may decide to accept, reject or waitlist referrals based on the information available on the referral card. However, if you want to see more client information prior to accepting a referral, select **View referral summary and client record** to view details of the referral, the client's assessment and assessment outcomes and more detailed information about the client.

Ian DONNELLY

Aged 114 (1 January 1911), Male WESTON, ACT, 2611

| | | | |
|----------------------------|-------------------------------------|---------------------------|---------------------------|
| About this referral | | About this service | |
| Outlet | Aussie Healthcare - Support At Home | Referred for | Support at Home |
| Date referred | 22 August 2025 | Service item name | Allied health and therapy |
| Date due | 25 August 2025 | Naps service Id | 1265 |
| Referral comments | No referral comments provided | | |

Home support Short-term - SaH Restorative Care Pathway Funding assigned

VIEW REFERRAL SUMMARY AND CLIENT RECORD

ACCEPT REFERRAL
ACCEPT TO WAITLIST
REJECT REFERRAL

! For Support at Home services, the detailed referral view will display the recommended frequency and intensity.

! The detailed referral view will also display the recommended frequency and intensity of recommended CHSP services. This is a recommendation only to assist providers when discussing service options with the client. This information is also available from the **Services** and **Referrals for my Organisation** tabs in the client record.

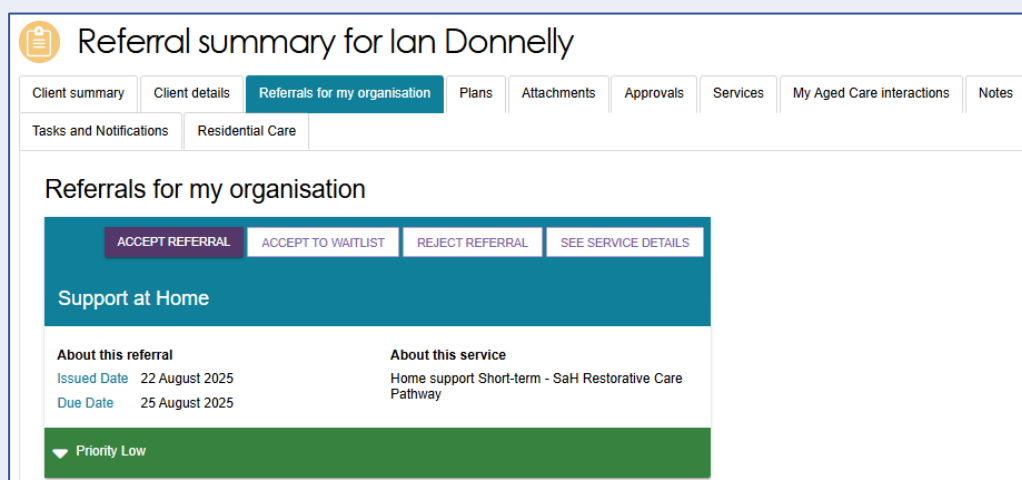
Bruce WAYNE

Age 92 (February 19, 1970), Male BRUNSWICK, VIC, 2900

| | | | |
|-------------------------------|----------------------------|---------------------------|-----------------------------|
| Client contact details | | About this service | |
| Preferred contact number: | 1234567890 | Referred for: | Support at Home |
| About this referral | | Service item name: | Support at Home - Brunswick |
| Outlet: | Wayne Enterprises - Gotham | NAPS service ID: | 24113 |
| Date referred: | 22 January 2025 | | |
| Date accepted: | 29 January 2025 | | |
| Referral comments: | No referral comments | | |

| | |
|--|---|
| <p>Home Support Ongoing - Classification 5</p> <p>Assistive Technology Short-term - High</p> | <p>● Service ceased</p> <p>Start date: 22 January 2025</p> <p>End date: 23 January 2025</p> <p>Service provider comments: none</p> <p>Status: Ceased</p> <p>● Service ceased</p> <p>Start date: 22 January 2025</p> <p>End date: 23 January 2025</p> <p>Service provider comments: none</p> <p>Status: Ceased</p> |
|--|---|

2. If you select **View referral summary and client record**, the **Referrals for my organisation** screen will display. Any referrals issued to your organisation for the client will be displayed.



Referral summary for Ian Donnelly

Client summary Client details **Referrals for my organisation** Plans Attachments Approvals Services My Aged Care interactions Notes

Tasks and Notifications Residential Care

Referrals for my organisation

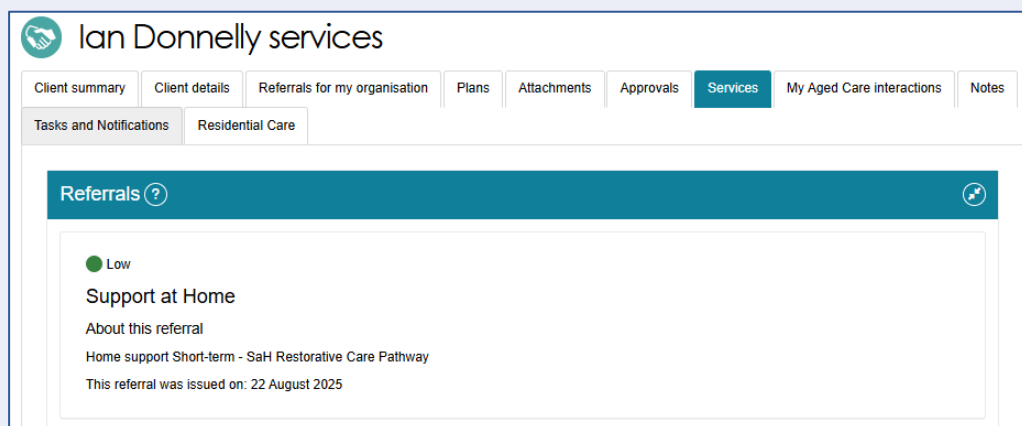
ACCEPT REFERRAL ACCEPT TO WAITLIST REJECT REFERRAL SEE SERVICE DETAILS

Support at Home

| | |
|----------------------------|--|
| About this referral | About this service |
| Issued Date 22 August 2025 | Home support Short-term - SaH Restorative Care Pathway |
| Due Date 25 August 2025 | |

▼ Priority Low

Referrals are also shown on the **Services** tab.



Ian Donnelly services

Client summary Client details Referrals for my organisation Plans Attachments Approvals **Services** My Aged Care interactions Notes

Tasks and Notifications Residential Care

Referrals ?

● Low

Support at Home

About this referral

Home support Short-term - SaH Restorative Care Pathway

This referral was issued on: 22 August 2025

3. You must review the referral and client information and that you have decided to provide services to the client prior to accepting the referral.

The information is located in the Client Details tab. These details include:

- Primary contact person
- Identity information and status of identity check
- Communication requirements
- Address and contact details (Suburb, State/Territory and postcode only) (viewable only once a referral has been accepted)
- Payment details
- Health insurance details
- Service information
- Current notes
- A **Notify My Aged Care of Death** button.

You can view the following information on the other tabs of the client record:

- Client Summary
- Referrals
- Attachments
- Approvals under the Act
- Services in place
- Tasks and notifications for that client
- My Aged Care interactions
- Current and previous assessment and support plan review information.

lan Edward DONNELLY
Male, 114 years old, 1 January 1911, AC85126431
WESTON, ACT, 2611
Primary contact: Ian Donnelly (self)
No support relationships recorded

Client details

The client has not yet completed a wallet check.
Conduct a wallet check now
Please remind Ian Donnelly to verify their mobile phone number when you see them next.

Client summary | **Client details** | Referrals for my organisation | Plans | Attachments | Approvals | Services | My Aged Care interactions

Notes | Tasks and Notifications | Residential Care

About Ian

Personal information
Born 1 January 1911, Afrikaans, born in Australia, divorced, lives alone
Status: Active
Preference for a First Nations Assessment Organisation to do their assessment: No

Primary Contact
This is who My Aged Care will contact first
Ian DONNELLY (self)

Communication requirements
• Prefer to speak English

Address details
Home address
WESTON, ACT, 2611

Identity documents (ID)
Aged Care ID: AC85126431
Aged Care Management Payment System (ACMPS) number: 0413384919
Identity Status
IHI Record status: Not Attempted
Identity match status: Not Attempted
Wallet check status: Not Attempted
Client association status: Not Associated

Payment details
Receiving payments
No payments found

Health insurance

[NOTIFY MY AGED CARE OF A DEATH](#)

4. To accept the referral, refer to [Accepting a Referral](#).

To reject the referral, refer to [Rejecting a Referral](#).

To accept the referral to waitlist, refer to [Accepting a Referral to Waitlist](#).

The [My Aged Care Service and Support Portal user guide – The client record](#) contains further information about navigating the client record and what information can be viewed.

- ! It is critical that you review the referral and client information and that you have decided to provide services to the client prior to accepting the referral.
- ! Only accept the referral once the provider has confirmed the capacity to deliver the required services. Client agreement to proceed should also be confirmed prior to acceptance.
- ! Client contact details and full address details can only be viewed once a referral has been accepted.

Accepting a Referral

1. To accept the referral, select **ACCEPT REFERRAL** from the **Referral summary** page or from the expanded card or list view in incoming referrals tab.

Accepting Referral from Referral Summary

Referral summary for Ian Donnelly

Client summary | Client details | **Referrals for my organisation** | Plans | Attachments | Approvals | Services | My Aged Care interactions | Notes

Tasks and Notifications | Residential Care

Referrals for my organisation

ACCEPT REFERRAL | ACCEPT TO WAITLIST | REJECT REFERRAL | SEE SERVICE DETAILS

Support at Home

| | |
|----------------------------|--|
| About this referral | About this service |
| Issued Date 22 August 2025 | Home support Short-term - SaH Restorative Care Pathway |
| Due Date 25 August 2025 | |

▼ Priority Low

Accepting Referral from Incoming Referrals Tab (Card View)

lan DONNELLY

Aged 114 (1 January 1911), Male | WESTON, ACT, 2611

| | |
|--|--|
| About this referral | About this service |
| Outlet: Aussie Healthcare - Support At Home | Referred for: Support at Home |
| Date referred: 22 August 2025 | Service item name: Allied health and therapy |
| Date due: 25 August 2025 | Naps service Id: 1265 |
| Referral comments: No referral comments provided | |

Home support Short-term - SaH Restorative Care Pathway | Funding assigned

VIEW REFERRAL SUMMARY AND CLIENT RECORD

ACCEPT REFERRAL | ACCEPT TO WAITLIST | REJECT REFERRAL

Accepting Referral from Incoming Referrals Tab (List View)

The screenshot shows the 'Incoming referrals' interface. At the top, there are tabs for 'Incoming referrals', 'Waitlist', 'Accepted services pending', 'Services in place', and 'Referral history'. A red box highlights the 'CARD' and 'LIST' view toggles. Below the tabs is a 'Filter by' search bar. The main content area shows a table of referrals with columns: Last name, First name, Aged care user ID, Due date, Referred date, Referred for, Recommended start date, and Priority. A red box highlights the 'ACCEPT REFERRAL' button at the bottom of the interface.

| Last name | First name | Aged care user ID | Due date | Referred date | Referred for | Recommended start date | Priority |
|-----------|------------|-------------------|-------------|---------------|-----------------------|------------------------|-----------------------|
| DONNELLY | Ian | AC85126431 | 25 Aug 2025 | 22 Aug 2025 | Support at Home, 1265 | | Low (13 days overdue) |

Referral Details:

- Client:** Aged 114 (1 January 1911), Male
- Location:** WESTON, ACT, 2611
- Outlet:** Aussie Healthcare - Support At Home
- Date referred:** 22 August 2025
- Date due:** 25 August 2025
- Referral comments:** No referral comments provided
- Service:** Support at Home
- Service item name:** Allied health and therapy
- Naps service Id:** 1265
- Pathway:** Home support Short-term - SaH Restorative Care Pathway
- Funding:** Funding assigned

Buttons: VIEW REFERRAL SUMMARY AND CLIENT RECORD, ACCEPT REFERRAL, ACCEPT TO WAITLIST, REJECT REFERRAL

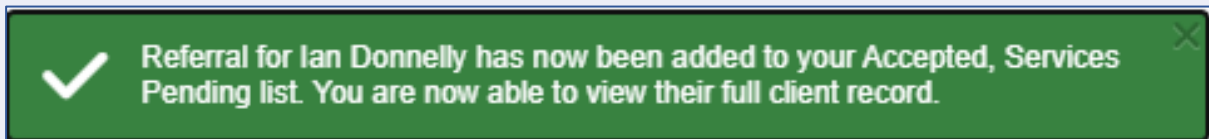
2. Select the correct service item name or NAPS Service ID (if your organisational has more than one service or NAPS ID available for the service type) you wish to link the referral to. Confirm that you want to accept the referral by selecting **ACCEPT**.

The screenshot shows a dialog box titled 'Accept this referral for Ian Donnelly'. It contains the text 'Accept this referral for Ian Donnelly (Referral ID#2-2268TR11)'. Below this is a section titled 'Select service item' with a help icon. A table lists three service items with radio buttons for selection. The first item is selected. At the bottom right, there are 'ACCEPT' and 'CANCEL' buttons.

| Referred for | NAPS ID | Service Name |
|--|---------|-------------------------------|
| <input checked="" type="radio"/> Support at Home | 1265 | Allied health and therapy |
| <input type="radio"/> Support at Home | 18684 | BHCG Case Management Services |
| <input type="radio"/> Support at Home | 17561 | Yass Valley 1234 Test 2 |

Buttons: ACCEPT, CANCEL

3. A confirmation banner will appear at the bottom of your screen confirming your acceptance of the referral and advising that the referral.



4. Access to the client's full record including complete address and contact information, will be available through the **Accepted services pending** tab.

A screenshot of a web application interface for "Accepted services pending". The interface includes a navigation bar with tabs: "Incoming referrals", "Waitlist", "Accepted services pending" (highlighted with a red box), "Services in place", and "Referral history". There are also "CARD" and "LIST" view toggles. A "Filter by" section is present. Below is a table with one row of data for Ian Donnelly. The table columns are: Last name, First name, Aged care user ID, Accepted date, Referred date, Referred for, Recommended start date, and Priority. Below the table, there are sections for "Client contact details", "About this referral", and "About this service". At the bottom, there are buttons for "VIEW REFERRAL SUMMARY AND CLIENT RECORD" (highlighted with a red box), "VIEW CLIENT REPORT", "REQUEST A REVIEW", and "REVOKE REFERRAL".

| Last name | First name | Aged care user ID | Accepted date | Referred date | Referred for | Recommended start date | Priority |
|-----------|------------|-------------------|---------------|---------------|-----------------------|------------------------|----------|
| DONNELLY | Ian | AC85126431 | 15 Sep 2025 | 22 Aug 2025 | Support at Home, 1265 | | Low |

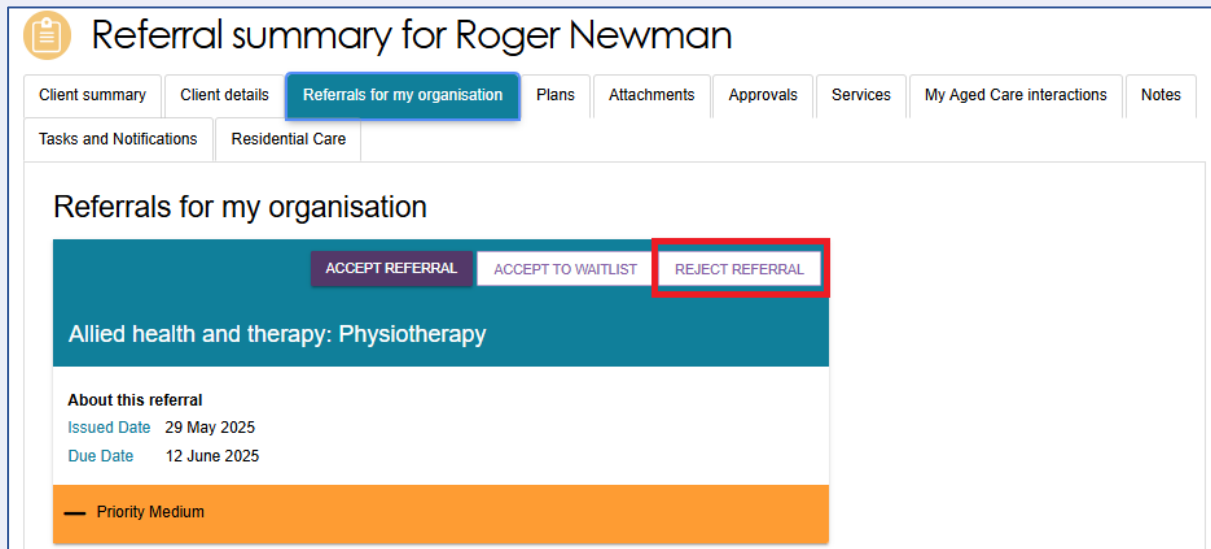
! Once a referral has been accepted, service delivery information must be provided within the priority status timeframes.

Details regarding this can be found in the [My Aged Care - Service and Support Portal resources](#) page on the department's Website.

Rejecting a Referral

1. To reject the referral, select **REJECT REFERRAL** located next to **ACCEPT REFERRAL** on the referral card or **Referral summary** page.

Rejecting Referral from the Referral Summary Page



Referral summary for Roger Newman

Client summary | Client details | **Referrals for my organisation** | Plans | Attachments | Approvals | Services | My Aged Care interactions | Notes

Tasks and Notifications | Residential Care

Referrals for my organisation

ACCEPT REFERRAL **ACCEPT TO WAITLIST** **REJECT REFERRAL**

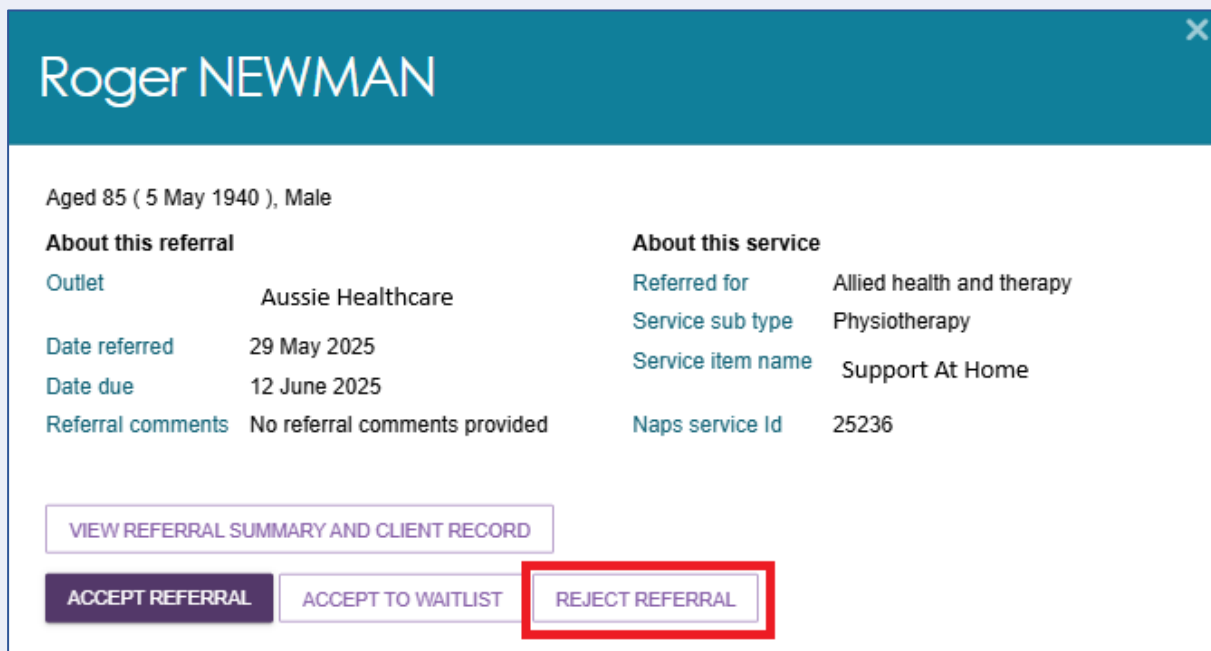
Allied health and therapy: Physiotherapy

About this referral

Issued Date 29 May 2025
Due Date 12 June 2025

— Priority Medium

Rejecting Referral from Incoming Referrals Tab (Card View)



Roger NEWMAN

Aged 85 (5 May 1940), Male

| About this referral | | About this service | |
|---------------------|-------------------------------|--------------------|---------------------------|
| Outlet | Aussie Healthcare | Referred for | Allied health and therapy |
| Date referred | 29 May 2025 | Service sub type | Physiotherapy |
| Date due | 12 June 2025 | Service item name | Support At Home |
| Referral comments | No referral comments provided | Naps service Id | 25236 |

VIEW REFERRAL SUMMARY AND CLIENT RECORD

ACCEPT REFERRAL **ACCEPT TO WAITLIST** **REJECT REFERRAL**

Rejecting Referral from Incoming Referrals Tab (List View)

The screenshot shows the 'Incoming referrals' tab in a software interface. At the top, there are navigation tabs: 'Incoming referrals', 'Waitlist', 'Accepted services pending', 'Services in place', and 'Referral history'. Below these are view options for 'CARD' and 'LIST'. A 'Filter by' section is visible, followed by a message '1 to 1 out of 1 matching result'. A table lists referral details:

| Last name | First name | Aged care user ID | Due date | Referred date | Referred for | Recommended start date | Priority |
|-----------|------------|-------------------|-------------|---------------|---|------------------------|--------------------------|
| NEWMAN | Roger | AC53400735 | 12 Jun 2025 | 29 May 2025 | Allied health and therapy, 25236: Physiotherapy | | Medium (74 days overdue) |

Below the table, there is a section for 'Aged 85 (5 May 1940), Male'. It includes 'About this referral' and 'About this service' details. At the bottom, there are three buttons: 'VIEW REFERRAL SUMMARY AND CLIENT RECORD', 'ACCEPT REFERRAL', and 'REJECT REFERRAL'. The 'REJECT REFERRAL' button is highlighted with a red border.

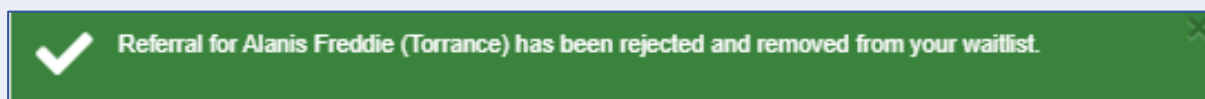
- You will be asked to select a reason for rejecting the referral from the drop-down list. You may also elect to enter additional information in the **Rejection reason** free text field. If a client has passed away during an assessment period, Team Leaders will need to select **Client deceased** from the drop-down list.

The screenshot shows a dialog box titled 'Reject referral for Roger Newman'. It contains the following text: 'All fields marked with an asterisk (*) are required. You are about to reject the referral for Roger Newman (Referral ID#2-21L8QZ8H). Reason for rejecting *'. Below this is a 'Select one' dropdown menu. The dropdown is open, showing the following options:

- Client in respite/hospital
- Client ineligible
- Client uncontactable
- Outside service region
- Referral made in error
- Insufficient capacity
- No one accredited
- Conflict of interest
- Other
- Further info to be added
- Service no longer required
- Client deceased
- Unable to process referral

3. Comments regarding the **Rejection reason** are displayed in the Assessor portal but not in the client's Online Account. Providing a rejection reason assists assessors and the My Aged Care contact centre to support clients in accessing services.

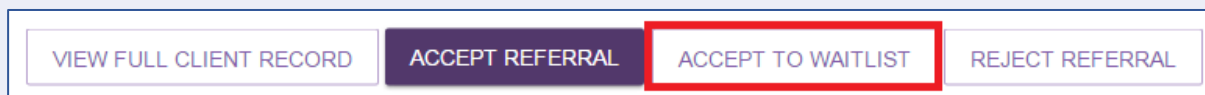
Upon rejection, a confirmation banner will appear at the bottom of the screen.



- ! If you do not have capacity to provide the service type, your Administrator should update your service availability and information in the portal.

This process is described in the *Adding service items* section of the [Service and Support Portal user guide Part 1 – Administrator functions](#).

4. If you are unable to provide the service at the time and you have a waitlist available, you can [accept the referral to your waitlist](#). The referral will appear in your outlet's **Waitlist** tab. This process is described in [Service and Support Portal user guide Part 1 – Administrator functions](#). This option is only available if the service is configured by your Administrator to offer waitlist.



Rejecting a Referral – Client Deceased

- ! Rejecting a 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**.

Where a client is active in the Support at Home Priority System or has been assigned Support at Home funding, this will remove the client from the Support at Home Priority System and withdraw any assigned Support at Home funding.

1. After selecting 'Client Deceased' from Step 2, You will be redirected to the **Reject referral** screen and will need to enter the following information:
 - Who, when and how you were informed that this person is deceased. For example, "Mrs Smith rang to inform us that Mr Smith has passed away on Saturday"
 - Date of Death (if known)
 - Add Attachments, for example Death Certificate, Hospital Discharge documents
 - Enter additional information in the **Rejection reason** free text field (not mandatory).

Reject referral for Roger Newman ✕

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

You are about to reject the referral for Roger Newman (Referral ID#2-21L8QZ8H).

Reason for rejecting *

Client deceased ▼

You are about to notify the department that Roger Newman 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:

REJECT
CANCEL

! The provider can add notes and attachments to the client record for 14 days after ceasing services for their client.

Revoking a Referral After Acceptance

There may be circumstances after you have accepted a referral for service that affect your ability to provide services to that client. For example, the client withdraws their consent for service provision, or their circumstances change.

You can only revoke accepted referrals where service delivery information has not been entered and/or services haven't commenced.

The Department will monitor the use of this functionality, and notifications will be sent to service providers where 20% or more of referrals issued to the outlet over a period of 12 months have been revoked after acceptance.

Follow these steps to revoke a referral after acceptance:

1. Navigate to the **Accepted services pending** tab in the **Service referrals** section of the provider portal and locate the accepted referral that you wish to revoke. You are able to filter the results by expanding the **Filter** functionality, sort the results by editing the sort order and selecting **GO**, or change the display of information between **Card** or **List** views.

Accepted services pending

Incoming referrals | Waitlist | **Accepted services pending** | Services in place | 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 4 out of 4 matching results

Lori KNOWLES
HARRISON, ACT, 2914
Aged care user ID: AC76460476
Date accepted: 12 February 2019
Date referred: 12 February 2019
Outlet: Aged Care Inc - Outlet 1
Service type: Meals, 1-HUVJ2EC
Medium

Sam POWELL
PHILLIP, ACT, 2606
Aged care user ID: AC02320257
Date accepted: 20 February 2019
Date referred: 20 February 2019
Outlet: Aged Care Inc - Outlet 1
Service type: Domestic Assistance, 1-560SZG9
Low

Lilly FIELD
DOWNER, ACT, 2602
Aged care user ID: AC65143935
Date accepted: 20 February 2019
Date referred: 20 February 2019
Outlet: Aged Care Inc - Outlet 1
Service type: Allied Health and Therapy Services, 1-12DMT35; Dietitian or Nutritionist
Medium

2. Select the accepted referral you wish to revoke and expand the information. You are then able to select **REVOKE REFERRAL**.

CARD VIEW

Ian DONNELLY

Aged 114 (1 January 1911), Male

WESTON, ACT, 2611

Client contact details
Preferred contact number Not specified

About this referral
Date issued 22 August 2025
Date accepted 15 September 2025
Outlet Aussie Healthcare

About this service
Referred for Support at Home
Service item name Allied health and therapy
Naps service Id 1265

Referral comments No referral comments provided

Home support Short-term - SaH Restorative Care Pathway Funding assigned

VIEW REFERRAL SUMMARY AND CLIENT RECORD VIEW CLIENT REPORT

REQUEST A REVIEW **REVOKE REFERRAL**



LIST VIEW

| Last name | First name | Aged care user ID | Accepted date | Referred date | Referred for | Recommended start date | Priority |
|-----------|------------|-------------------|---------------|---------------|-----------------------|------------------------|----------|
| DONNELLY | Ian | AC85126431 | 15 Sep 2025 | 22 Aug 2025 | Support at Home, 1265 | | Low |

Aged 114 (1 January 1911), Male WESTON, ACT, 2611

Client contact details **About this service**

Preferred contact number Not specified Referred for Support at Home

About this referral Service item name Allied health and therapy

Date issued 22 August 2025 Naps service Id 1265

Date accepted 15 September 2025

Outlet Aussie Healthcare

Referral comments No referral comments provided

Home support Short-term - SaH Restorative Care Pathway
Funding assigned

VIEW REFERRAL SUMMARY AND CLIENT RECORD
VIEW CLIENT REPORT

REQUEST A REVIEW
REVOKE REFERRAL

3. Select the reason for revocation from the drop-down menu and enter detailed information in the Comments section to explain why you are revoking the referral after acceptance. Select **REVOKE REFERRAL**.

Revoke Ian Donnelly referral ✕

You should only accept a referral for service where you intend to provide services to a client. If the circumstances have changed and you're no longer able to provide services to a client, then you can revoke the accepted referral once you've provided a reason.

Please note that the department monitors revoked referrals as they have a direct impact on the timely delivery of aged care services to clients.

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

Please select a reason for revocation after acceptance (*)

Reason for revocation after acceptance *

Select one

Select one

Client withdrew

Unable to deliver service

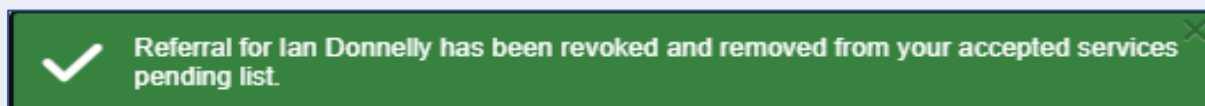
Client deceased

Other

REVOKE REFERRAL
CANCEL



- You will receive confirmation that the referral has been revoked, and it will no longer appear in your **Accepted services pending** tab.



! When a referral is revoked after acceptance, other referrals (such as from a broadcast or preference referral) will be automatically issued.

Revoking a Referral - Client Deceased

Revoking a 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 My Aged Care Online Account will be revoked. My Aged Care will not send correspondence to the client or their support network after the status is changed to **Deceased**.

Where a client is active in the Support at Home Priority System or has been assigned a Support at Home service, updating the client to deceased will remove the client from the Support at Home Priority System and withdraw any assigned Support at Home services.

When the **Client deceased** option is selected, you will be prompted to enter the following details:

- Who, when and how you were informed that this person is deceased. For example "Mrs. Smith rang to inform us that Mr. Smith passed away on Saturday".
- Date of death (if known)
- Attachments to be added. For example Death certificate, hospital discharge documents.

Revoke Ian Donnelly referral

You should only accept a referral for service where you intend to provide services to a client. If the circumstances have changed and you're no longer able to provide services to a client, then you can revoke the accepted referral once you've provided a reason.

Please note that the department monitors revoked referrals as they have a direct impact on the timely delivery of aged care services to clients.

All fields marked with an asterisk (*) are required.
Please select a reason for revocation after acceptance (*)

Reason for revocation after acceptance *
Client deceased

You are about to notify the department that Ian Donnelly 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...

Comments:

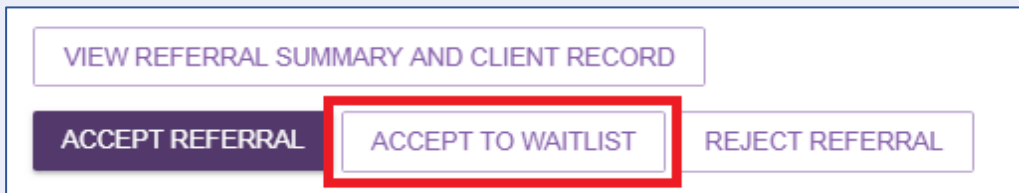
REVOKE REFERRAL CANCEL

Accepting a Referral to Waitlist

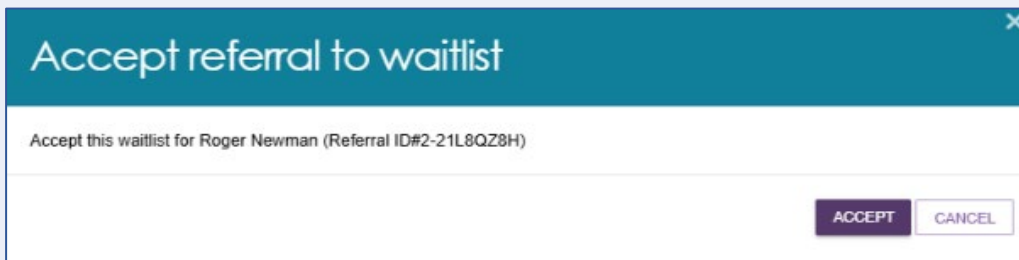
If a service provider chooses to turn on the waitlist function in the Portal, they will be able to accept electronic referrals to a waitlist. Accepting a referral to waitlist allows a client to be placed on a waitlist for a particular service until the service becomes available.

To accept waitlist referrals, the Administrator for your organisation must ensure that **Waitlist availability** for specific services is set to **On**. This procedure is described in [My Aged Care – Service and Support Portal user guide – Creating service delivery outlets and adding service information](#).

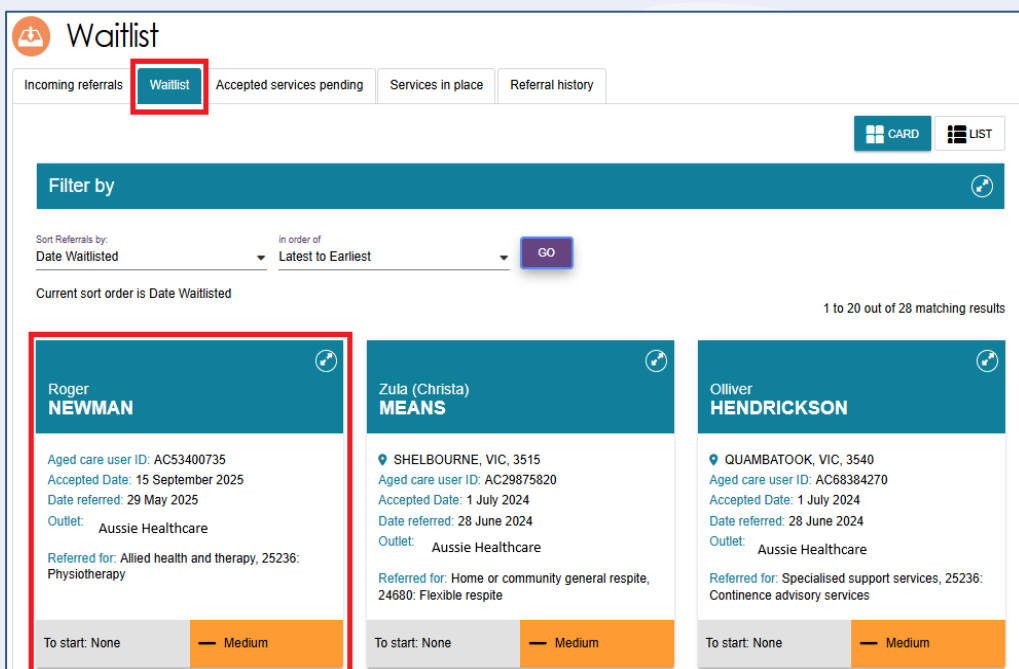
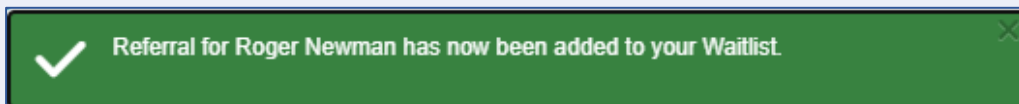
1. Navigate to the **Service referrals** page and view the **Incoming referrals** tab.
2. Expand the client's information in either the card or list view and select **Accept to Waitlist**.



3. Select **Accept**.



4. You will receive confirmation that the referral has been waitlisted. The referral will now appear in the **Waitlist** tab in the **Service referrals** page.



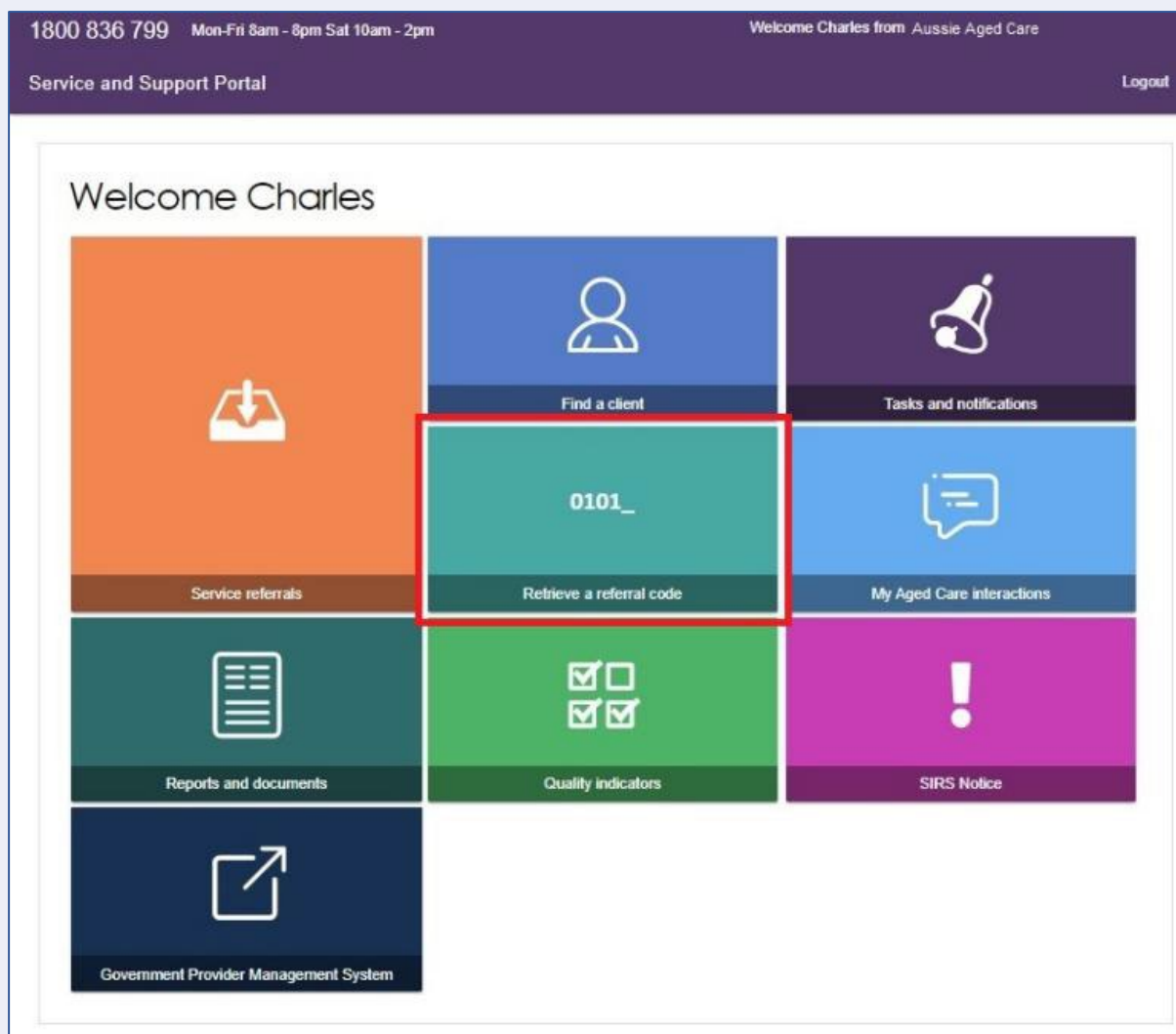
Retrieving a Referral Code

A client may choose to be issued with a referral code by assessors or My Aged Care contact centre staff.

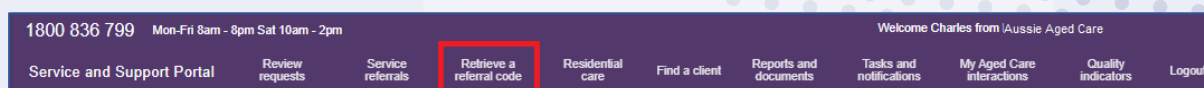
A referral code allows clients to visit different service providers to discuss their needs prior to choosing their preferred provider.

If a service provider Team Leader has been given a referral code, they should follow the procedure below to retrieve the referral.

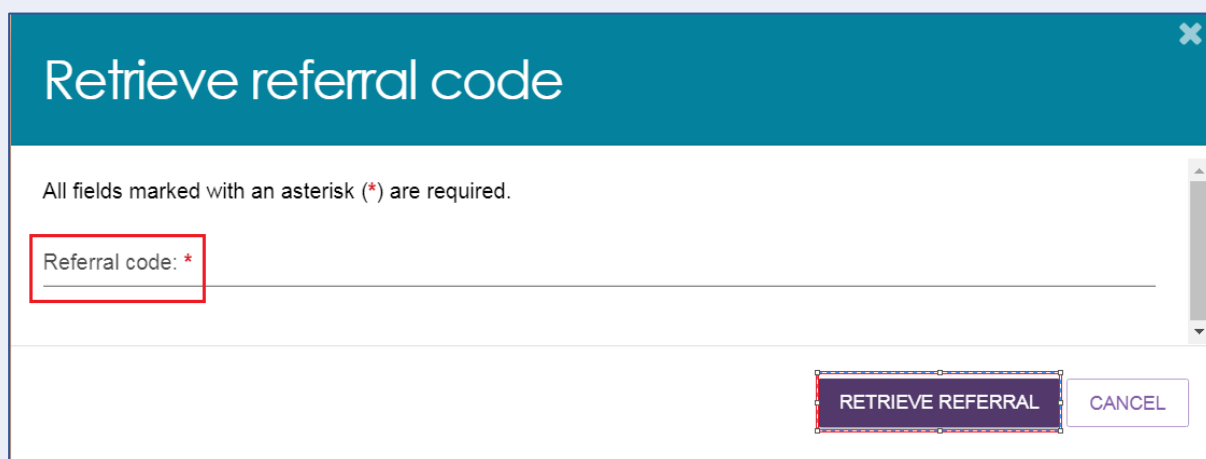
1. From the homepage select **Retrieve a referral code**.



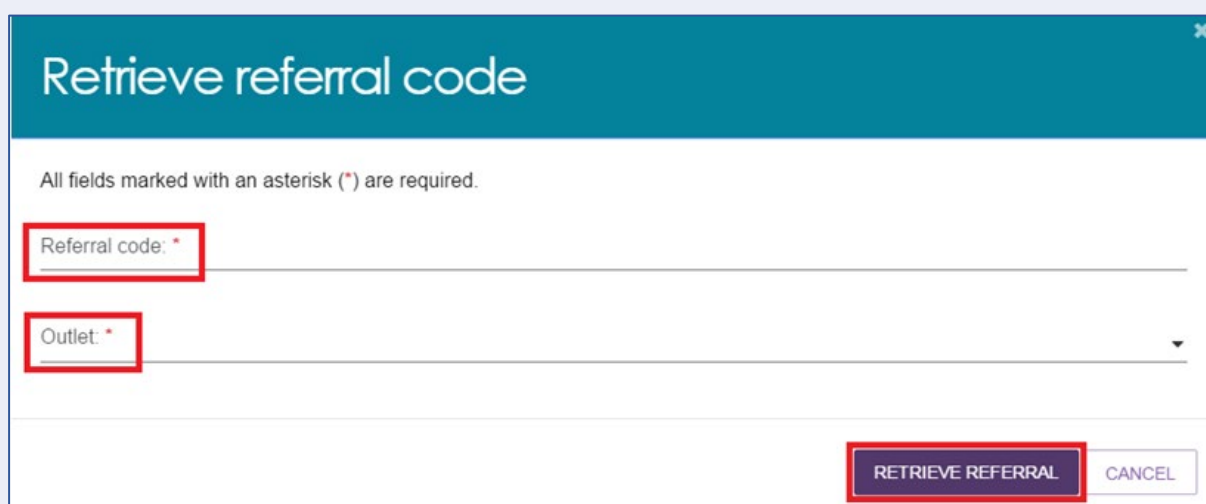
Alternatively, from any other page you can select **Retrieve a referral code** from the toolbar displayed at the top right corner of the portal.



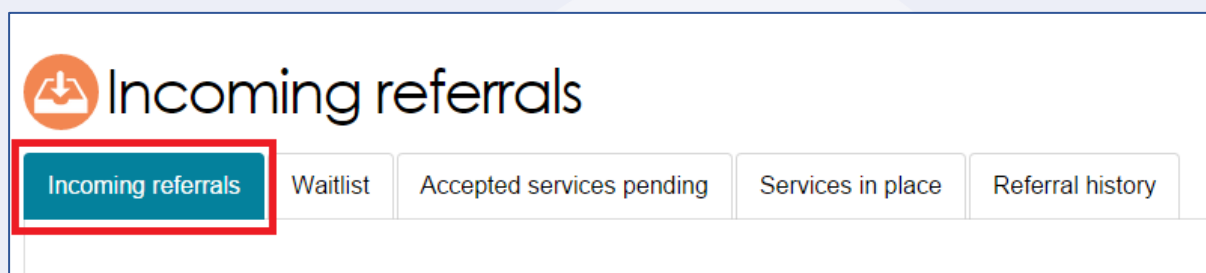
2. Enter the client's referral code and select the outlet in which services will be provided from. Then select **Retrieve referral**.



If you are a team leader at the organisation, select the outlet you wish to refer the client to. Outlet team leaders will not have this option.



3. A confirmation message will display confirming the successful retrieval of the referral, and the referral will be added to your **Incoming referrals** tab within the **Service referrals** tile.



4. You will be directed to the **Incoming referrals** page where you can view details of the referral. Depending on client preferences, and your capacity to provide services, you can either:
 - [accept or reject the referral for service\(s\)](#);
 - [accept the referral to waitlist](#); or
 - [revoke the referral after acceptance](#).

! It is critical that you review the referral and client information and that you have decided to provide services to the client prior to accepting the referral. Only accept the referral if both the provider and client agree to commence services.

! A referral code will need to be reactivated if it has previously been accepted by another provider, a previously commenced service has ceased, or the time limited approval has lapsed. Clients and their supporter can now manage their referral codes via their My Aged Care Online Account.

! Home Support services

If you are a Support at Home service provider and encounter a client who would like to change their provider, they can reactivate their referral code via the My Aged Care Online Account. For further information, refer the client to the [Access your information online](#) website or call the My Aged Care contact centre on 1800 200 422.

Referrals for Support at Home services will only be issued, usually via the provision of a referral code to the client once a service has been assigned. Providers should not use the **take up deadline** by which they must have commenced services with a client for the Support at Home program, or else the assigned service/s will be withdrawn.

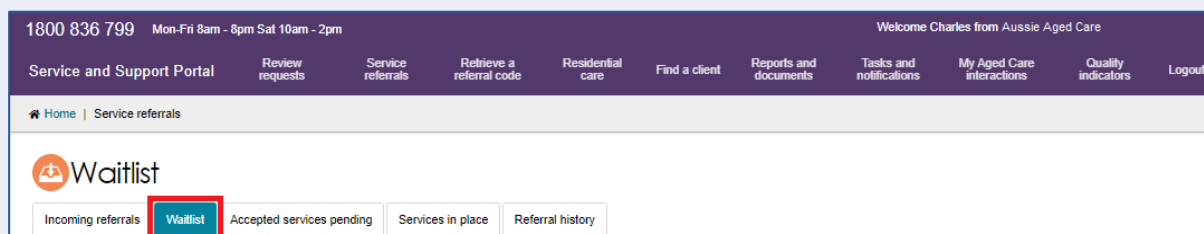
Drawing a Client into Service from a Waitlist

When a service becomes available for a corresponding referral in your waitlist, you can draw the client into service and commence service delivery.

Clients may be on more than one waitlist, with other providers, at any one time. If a service becomes available, and the client is **drawn down into service**, the client will be removed from all other provider waitlists for that same service type.

1. Navigate to the **Waitlist** tab in the **Service referrals** tile of the Service and Support Portal.

Referrals that have been accepted to waitlist will be displayed here.



2. Find the client referral that you want to accept to service and expand the client's information by selecting the arrows on the card or list view. You can filter the results by expanding the **Filter** functionality, sort the results by editing the sort order and selecting **Go**, or change the display of information between **Card** or **List** views.

! Prior to drawing down a client into service, be sure to review the referral summary and client record to confirm that you are still able to provide this service to the client.

Select **Draw down into service**.

Jolly Test JUPITER ✕

Aged 83 (1 July 1939), Female

Client contact details

Preferred contact number Not specified

About this referral

Date issued 8 March 2022

Date accepted 10 June 2022

Outlet Aussie Aged Care

Referral comments No referral comments provided

EVATT, ACT, 2617

About this service

Service type Residential Permanent

Service sub type No sub types

Service item name Aussie Aged Care

Naps service Id 1139

VIEW REFERRAL SUMMARY AND CLIENT RECORD
VIEW CLIENT REPORT

DRAW DOWN INTO SERVICE
REJECT REFERRAL

3. Select the correct service item name or NAPS Service ID (if your organisation has more than one service/NAPS ID available for a service type) you wish to link the referral to.
Confirm that you want to accept the referral by selecting **Accept**.

Draw down into service for Jolly Test Jupiter ✕

Draw down into service for Jolly Test Jupiter (Referral ID#2-ZNVTS7C)

Select service item ?

| Service Type | NAPS ID | Service Name |
|--|---------|------------------|
| <input checked="" type="radio"/> Residential Permanent | 1139 | Aussie Aged Care |

ACCEPT
CANCEL

A confirmation message will appear confirming the acceptance of the referral.

The referral has now been accepted into service and the client's referral will now appear in the **Accepted services pending** tab until service delivery information is recorded for the service.

Accepted services pending

Incoming referrals
Waitlist
Accepted services pending
Services in place
Referral history

To reject a referral that is on your waitlist, select **Reject referral** and a reason for rejection, then select **Reject**. Providing a rejection reason assists assessors and the My Aged Care contact centre to support clients in accessing services.

Tara SUMMER ✕

Aged 78 (1 July 1939), Female

Client contact details
Preferred contact number 0411 899 636

About this referral
Date issued 22 May 2018
Date accepted 11 June 2018
Outlet Aged Care Inc - Outlet 1
Referral comments No referral comments provided

📍 FRANKLIN, ACT, 2913

About this service
Service type Allied Health and Therapy Services
Service sub type Podiatry
Service item name Allied Health and Therapy Services - At Client Location
Naps service Id 7765
Recommended start date 1 June 2018

VIEW REFERRAL SUMMARY AND CLIENT RECORD

VIEW PDF OF CLIENT RECORD

DRAW DOWN INTO SERVICE

REJECT REFERRAL

The referral will be removed from your waitlist and will no longer be visible in the Service and Support Portal.

Notifications for Overdue Referrals

Team Leaders will see visual indicators in their incoming referral tab for referrals that have not been actioned (accepted, rejected or waitlisted) within priority timeframes.

Incoming referrals

Smita
WINTER

📍 DUNLOP, ACT, 2615
Aged Care ID: AC64715667
Date referred: 12 July 2017
Due date: 26 July 2017
Outlet: Aged Care Allied Health & Residential
Service type: Domestic Assistance, 8693: General House Cleaning

!

— Medium (85 days overdue)

Beryl (Everett)
WARING

📍 MERIMBULA, NSW, 2548
Aged Care ID: AC84694512
Date referred: 2 March 2017
Due date: 16 March 2017
Outlet: Aged Care Allied Health & Residential
Service type: Flexible Respite, 8693: Other planned respite

!

— Medium (179 days overdue)

Referral Priority Status

Incoming service referrals are assigned a priority status (low, medium, high) based on a client's level of function, the level of risk in relation to the care situation, and any other concerns that are relevant to the client's circumstances identified during the screening or assessment process.

Service providers are required to action referrals (accept, reject or waitlist) within 3 calendar days of receiving an electronic referral for service or electronic referral for waitlist.

! Support at Home program approvals will not display as a service priority.

More Information and Support

Further information is available from the [My Aged Care – Service and Support Portal resources](#) webpage.

The My Aged Care Service Provider and Assessor Helpline is available by calling 1800 836 799.