s47E(c), s47F

**From:** BLACKWOOD, Rachel
**Sent:** Sunday, 16 November 2025 6:47 PM
**To:** BARNETT, Erika
**Subject:** RE: FYI: THCP & Lower IAT Outcome [SEC=OFFICIAL]

**Categories:** FOI 11June, NFA

OFFICIAL

Belated thanks! Super useful.

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OFFICIAL

**From:** BARNETT, Erika
**Sent:** Thursday, 13 November 2025 12:15 PM
**To:** BLACKWOOD, Rachel
**Subject:** FW: FYI: THCP & Lower IAT Outcome [SEC=OFFICIAL]

OFFICIAL



Hi Rachel,

As discussed, please see advice below from the team, but note that we will need to do a few more scenarios as well.

In short, no override to retain a transitioned HCP level, just need to "Accept". They can add CHSP and AT-HM on after this.

If they need EoL or Restorative care, they should start with the EoL or RC override, but I need to see the extra screens on how it shows they're retaining their transitioned level in this scenario.

Regards,
Erika

**Erika Barnett**
A/g Assistant Secretary

Reform Implementation Division | Ageing and Aged Care Group
Assessment and Home Care Transition Branch
T: 02 s47E(c), s47F | E: erika.barnett@health.gov.au
Location: Sirius Building – Level 8
GPO Box 9848, Canberra ACT 2601, Australia

*The Department of Health, Disability and Ageing acknowledges the Traditional Custodians of Australia and their continued connection to land, sea and community.*

*We pay our respects to all Elders past and present.*

---

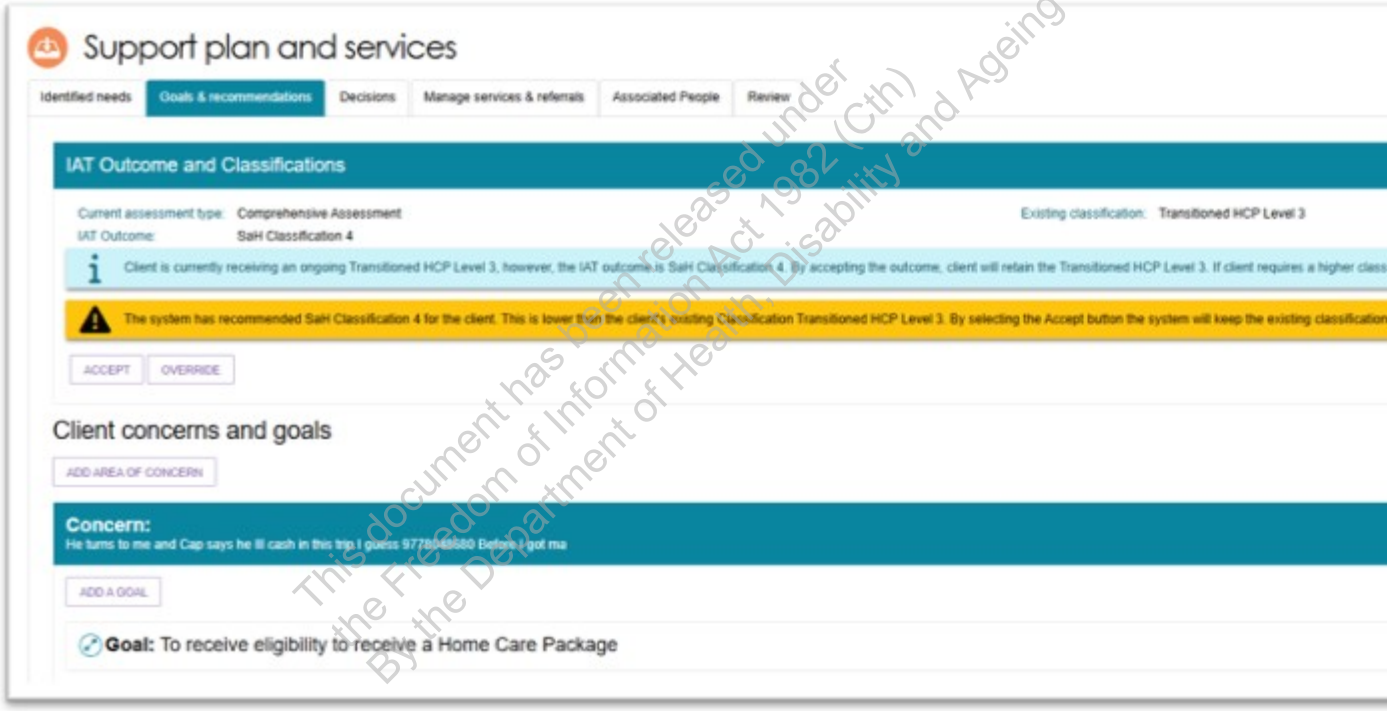
OFFICIAL

**From:** s47E(c), s47F @Health.gov.au>
**Sent:** Thursday, 13 November 2025 10:52 AM
**To:** BARNETT, Erika <Erika.BARNETT@health.gov.au>
**Cc:** s47E(c), s47F @health.gov.au>
**Subject:** FYI: THCP & Lower IAT Outcome [SEC=OFFICIAL]

OFFICIAL

Hi Erika – as requested over Teams, please see confirmation on the system behaviour when the algorithm produces a lower IAT outcome for a transitioned HCP participant.

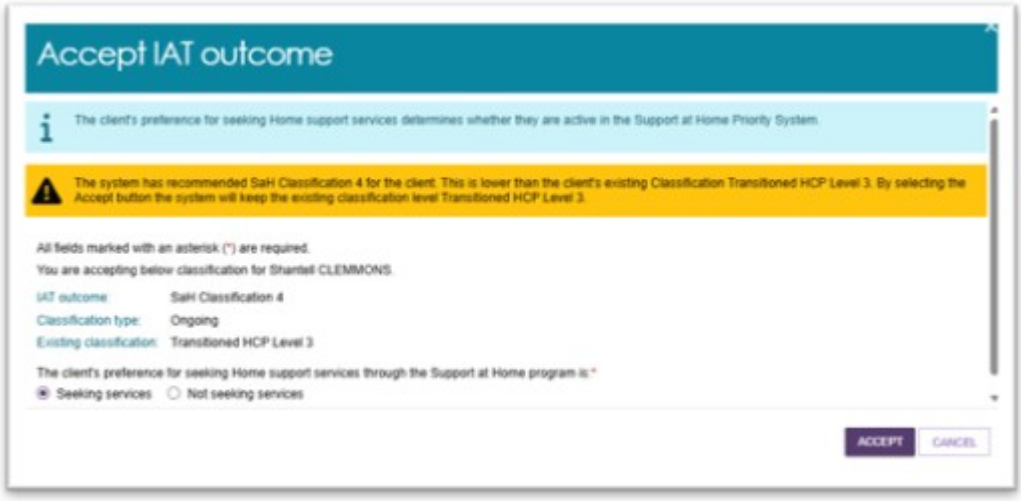
If the IAT outcome is lower than the existing Classification for a transitioned HCP participant, a warning message will be displayed advising about it.



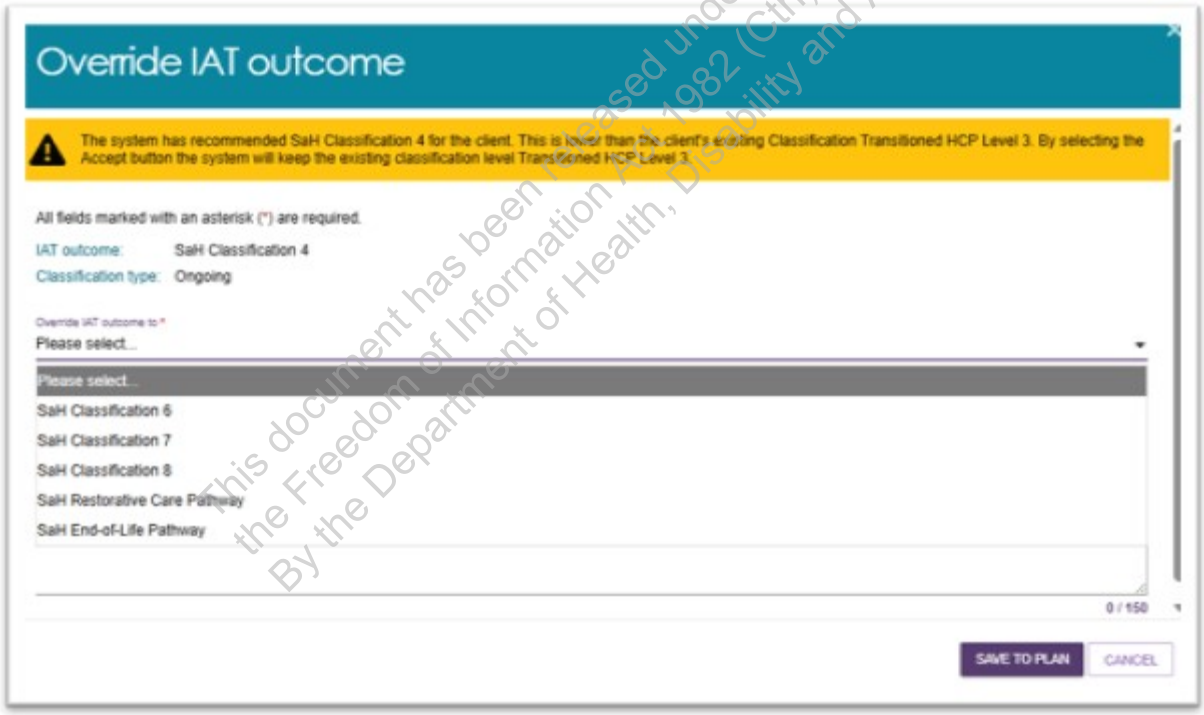



In order to dismiss the warning, the system provides the assessor 2 options – 'Accept' or 'Override'

- By choosing **Accept**, the system will retain the transitioned Classification




- By choosing **Override**, it maps THCP to the equivalent dollar-value of SaH. Override will NOT allow a SaH Classification at a lower dollar amount.
  For example, in the HCP transition scenario involving the HCP Level 3 participant, the participant has an IAT outcome of SaH 4 classification. This is lower than their current HCP level 3 budget allocation of $42,055.30, while SaH Classification 4 provides only $29,696.40. Even SaH Classification 5 ($39,697.40) would be lower, so to ensure the participant is not worse off, the override options show from the next classification appropriately (i.e., from SaH classification 6 in the screenshot below).






So to confirm, the system behaves in a way to ensure that the participant will not go backwards regardless of which option is chosen. Please let me know if you need any further info or have any questions.

Kind regards,

s47E(c), s47F

**Delivery Manager - Program Design and ICT Enablement Section**
**Assessment and Home Care Transition Branch**

Reform Implementation Division | Ageing & Aged Care Group
Australian Government, Department of Health, Disability and Ageing
M: s47E(c), s47F @health.gov.au

s47E(c), s47F

**From:** KOESASI, Katherine
**Sent:** Friday, 21 November 2025 3:07 PM
**To:** s47E(c), s47F BLACKWOOD, Rachel; SNOW, Jasmine; s47E(c), s47F
**Cc:** s47E(c), s47F
**Subject:** RE: draft email to MO - Assessor override of SAH classification [SEC=OFFICIAL:Sensitive]

**Follow Up Flag:** Follow up
**Flag Status:** Flagged

CIAL:Sensitive

Thanks s47E(c), s47F

All – FYI:

- s47C
- Of s47E(c), s47F three points from lunchtime below in chain. I have included the first two. I have not included the third point a. because it is not clear to me that s47E(c), s47F is seeking its inclusion and b. s47E(d)

Sending the email to Katie and s47E(c), s47F shortly.

Katherine

**Katherine Koesasi** (she/her)
**Assistant Secretary (acting)**

Access and Home Support Division | Ageing and Aged Care Group
Single Assessment System Branch
Australian Government Department of Health, Disability and Ageing
M: s47E(c), s47F @health.gov.au
Location: 595 Collins St, Melbourne, 16th Floor.
PO Box 9848, Canberra ACT 2601, Australia

At times I may email you outside business hours. Please do not assume I expect a reply outside business hours. Should I need your urgent attention, I will let you know.

*The Department of Health and Aged Care acknowledges First Nations peoples as the Traditional Owners of Country throughout Australia, and their continuing connection to land, sea and community. We pay our respects to them and their cultures, and to all Elders both past and present.*

OFFICIAL:Sensitive

**From:** s47E(c), s47F
**Sent:** Friday, 21 November 2025 1:13 PM

**To:** KOESASI, Katherine ; BLACKWOOD, Rachel ; SNOW, Jasmine ; s47E(c), s47F
**Cc:** s47E(c), s47F
**Subject:** RE: draft email to MO - Assessor override of SAH classification [SEC=OFFICIAL:Sensitive]

OFFICIAL:Sensitive

Thanks KK. As flagged, have spoken with Jas, and we'd be keen to include another couple of points. I've included these in green in the email.

s47E(c), s47F

---

OFFICIAL:Sensitive

**From:** KOESASI, Katherine s47E(c), s47F @Health.gov.au>
**Sent:** Friday, 21 November 2025 12:38 PM
**To:** s47E(c), s47F @Health.gov.au>; BLACKWOOD, Rachel <Rachel.BLACKWOOD@Health.gov.au>; SNOW, Jasmine <Jasmine.Snow@Health.gov.au>; s47E(c), s47F @Health.gov.au>
**Cc:** s47E(c), s47F @health.gov.au>; s47E(c), s47F @Health.gov.au>; s47E(c), s47F @Health.gov.au>; s47E(c), s47F @Health.gov.au>
**Subject:** RE: draft email to MO - Assessor override of SAH classification [SEC=OFFICIAL:Sensitive]

OFFICIAL:Sensitive

Thanks s47E(c), s47F,

I will incorporate s47E(c), s47F changes and then send through to Katie and s47E(c), s47F for their consideration prior to sending to Greg to action.

Best,

Katherine

**Katherine Koesasi** (she/her)
**Assistant Secretary (acting)**

Access and Home Support Division | Ageing and Aged Care Group
Single Assessment System Branch
Australian Government Department of Health, Disability and Ageing
M: s47E(c), s47F @health.gov.au
Location: 595 Collins St, Melbourne, 16th Floor.
PO Box 9848, Canberra ACT 2601, Australia

OFFICIAL:Sensitive

**From:** s47E(c), s47F @Health.gov.au>
**Sent:** Friday, 21 November 2025 12:08 PM
**To:** BLACKWOOD, Rachel <Rachel.BLACKWOOD@Health.gov.au>; SNOW, Jasmine <Jasmine.Snow@Health.gov.au>; KOESASI, Katherine s47E(c), s47F @Health.gov.au>; s47E(c), s47F @Health.gov.au>
**Cc:** s47E(c), s47F @health.gov.au>; s47E(c), s47F @Health.gov.au>; s47E(c), s47F @Health.gov.au>; s47E(c), s47F @Health.gov.au>
**Subject:** RE: draft email to MO - Assessor override of SAH classification [SEC=OFFICIAL:Sensitive]

OFFICIAL:Sensitive

Hi Rachel,

Thanks for circulating this. A couple of points from me:

- The first highlighted sentence is correct. The email could potentially include as additional words: s47C, s47E(d) [redacted]

s47E(c), s47F



OFFICIAL:Sensitive

**From:** BLACKWOOD, Rachel <Rachel.BLACKWOOD@Health.gov.au>
**Sent:** Thursday, 20 November 2025 10:05 PM
**To:** SNOW, Jasmine <Jasmine.Snow@Health.gov.au>; s47E(c), s47F @Health.gov.au>; s47E(c), s47F @Health.gov.au>; s47E(c), s47F @Health.gov.au>
**Cc:** s47E(c), s47F @health.gov.au>; s47E(c), s47F @Health.gov.au>; s47E(c), s47F @Health.gov.au>
**Subject:** draft email to MO - Assessor override of SAH classification [SEC=OFFICIAL:Sensitive]

OFFICIAL:Sensitive

Hi all, here's a draft email for Greg to potentially send MO (ideally tomorrow if we can settle it)!
@s47E(c), s47F is the s47E(d) [redacted]
@s47E(c), s47F is the first highlighted sentence correct?

All – am I understating the s47E(d)
Jas – as flagged, once you have settled this tomorrow I think it would be worth looping Katie & s47E(c), s47F in before finalising, given the s47E(d) . KK can settle further changes to the below for SASB tomorrow. Many thanks to s47E(c), s47F for sending me input for this today.
Rachel

---
Hi s47F and Sharyn

Further to the attached MB25-002554 which foreshadowed potential sensitivities likely to arise from 1 November, I am emailing to give you an update on the feedback we have received to date and outline s47E(d) . Subject to your views, we think it might be useful to have a meeting to discuss s47E(d) . There has been one media inquiry on this issue to date and we think it is likely to receive further attention, s47E(d)

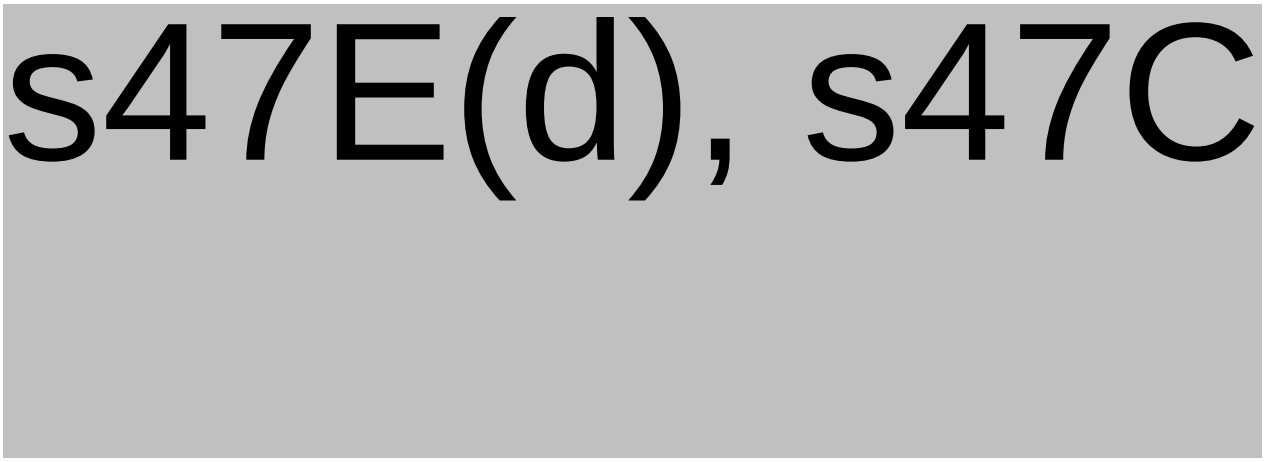
As outlined in the attached, we advised assessment organisations on 31 October 2025 that the Aged Care Assessment Manual being released that day would include updated guidance on the circumstances in which assessors and assessment delegates may override the recommendation of the IAT algorithm recommendation. These circumstances are limited to specific short-term pathways and residential aged care. The Department also indicated that it welcomed feedback on how the reforms (including the operation of the algorithm) would be operating from 1 November



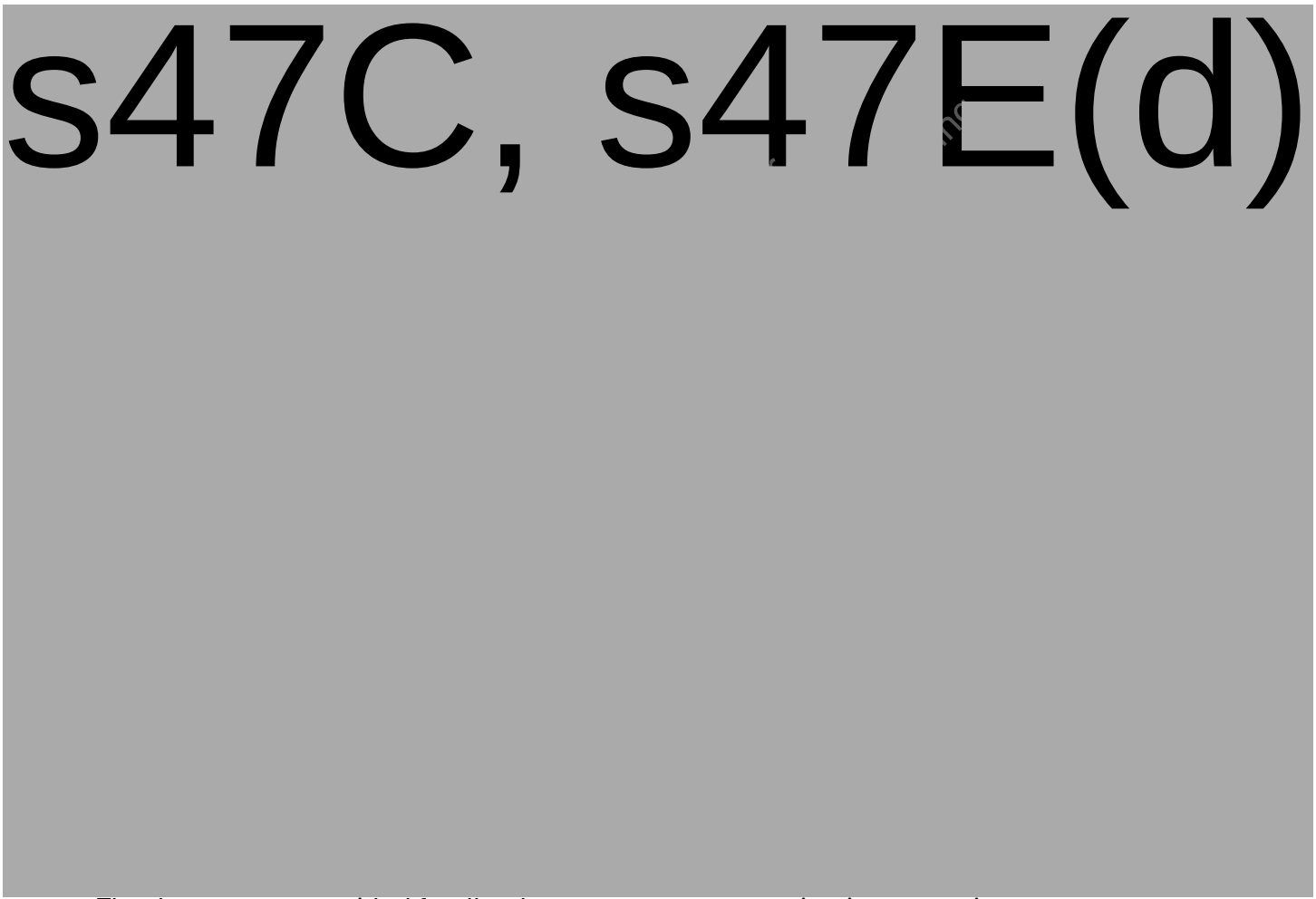
Summary of feedback received to date

- The majority of Aged Care Needs Assessment Organisations (including State and Territory Governments) have raised concerns about the inability to override the IAT classification algorithm, this includes:

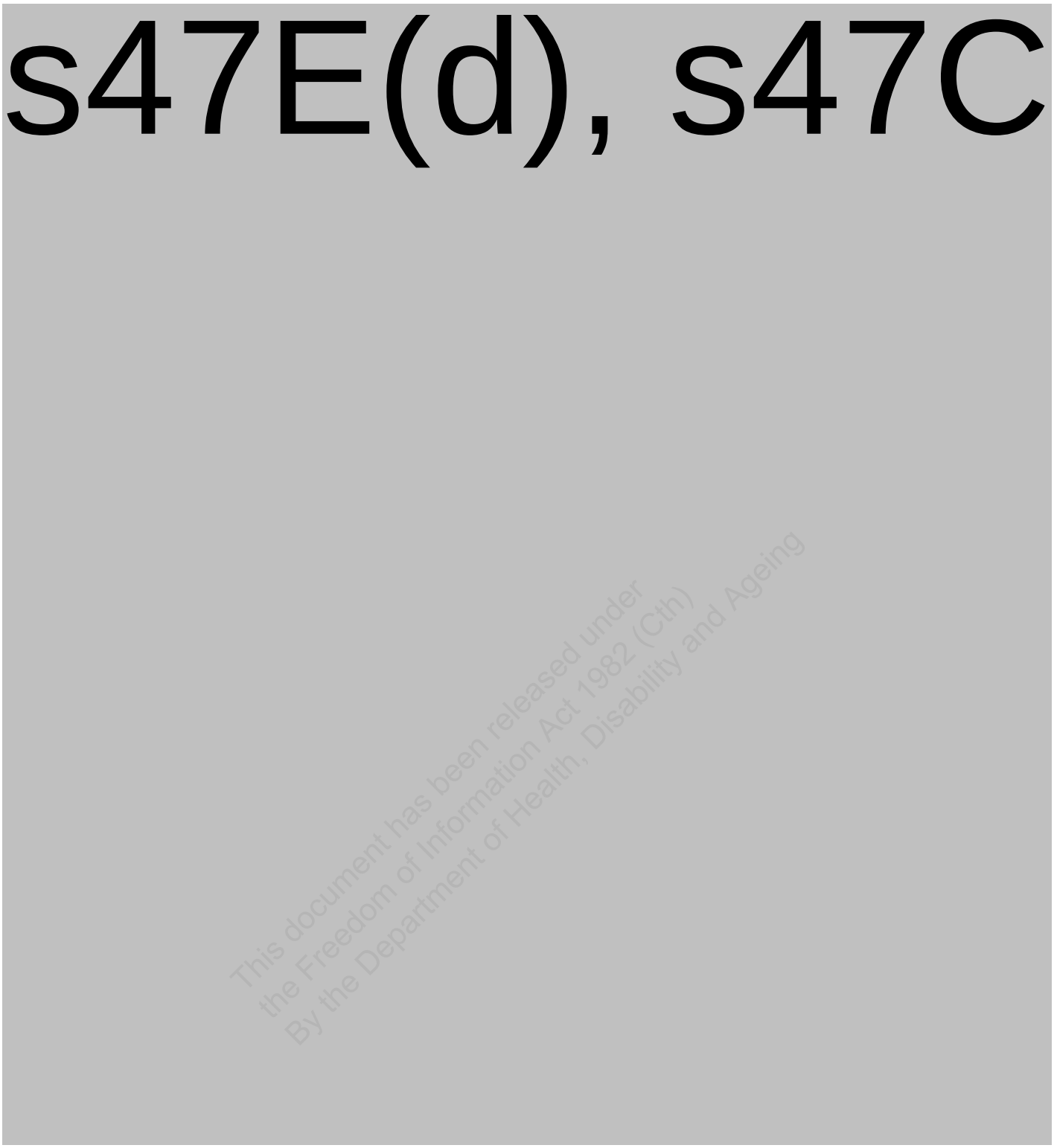
s47E(d), s47C




- Assessment organisations have provided details of cases in which assessors believe the algorithm has generated an outcome that does not align with client needs. The department is analysing these to inform development of advice to assessors and consideration of future updates to the algorithm.




- The department provided feedback to assessment organisation operations managers at a forum of Monday 17 November to address some of the initial issues identified. We are developing additional guidance material and Q&As, and will update training materials to provide additional guidance on scenarios.




We would be interested in your views on the s47E(d) before we progress further. Perhaps we can make a time to discuss this in the next week or so?

OFFICIAL:Sensitive

s47E(c), s47F

**From:** SNOW, Jasmine
**Sent:** Friday, 28 November 2025 5:12 PM
**To:** PUGH, Greg
**Cc:** KOESASI, Katherine; BLACKWOOD, Rachel; s47E(c), s47F
**Subject:** FW: For GP action: draft email to MO - Assessor override of SAH classification algorithm [SEC=OFFICIAL:Sensitive]
**Attachments:** MB25-002554.docx

**Importance:** High

Hi Greg

As discussed briefly, please find below some further information that may be useful to have to hand if the email below is discussed with MRO.

s47E(d), s47C

Thanks

Jas

**From:** PUGH, Greg
**Sent:** Tuesday, 25 November 2025 4:58 PM
**To:** STEWART, Sonja <Sonja.STEWART@Health.gov.au>; s47E(c), s47F @health.gov.au>
**Cc:** KOESASI, Katherine s47E(c), s47F @Health.gov.au>; DAY, Robert <Robert.Day@health.gov.au>; AHSDExecutive <s47E(d) @health.gov.au>; HOLM, Katie <Katie.HOLM@Health.gov.au>
**Subject:** FW: For GP action: draft email to MO - Assessor override of SAH classification algorithm [SEC=OFFICIAL:Sensitive]
**Importance:** High

Sonja – plan is to provide an update to the MO on the assessor override of the SAH classification algorithm, now we're about a month post commencement and as we indicated we would when providing the attached briefing. Do you want to discuss first before I hit go? Thanks to teams for drafting.

Greg

Hi s47F and Sharyn

Further to the attached MB25-002554 which foreshadowed potential sensitivities likely to arise from 1 November, I am emailing to give you an update on the feedback we have received to date and outline the s47E(d) Subject to your views, we think it might be useful to have a meeting to discuss s47E(d) There has been one media inquiry on this issue to date and we think it is likely to receive further attention, s47E(d) .

As outlined in the attached, we advised assessment organisations on 31 October 2025 that the Aged Care Assessment Manual being released that day would include updated guidance on the circumstances in which assessors and assessment delegates may override the recommendation of the IAT algorithm recommendation. These circumstances are limited to specific short-term pathways and residential aged care. The Department also indicated that it welcomed feedback on how the reforms (including the operation of the algorithm) would be operating from 1 November

Summary of feedback received to date

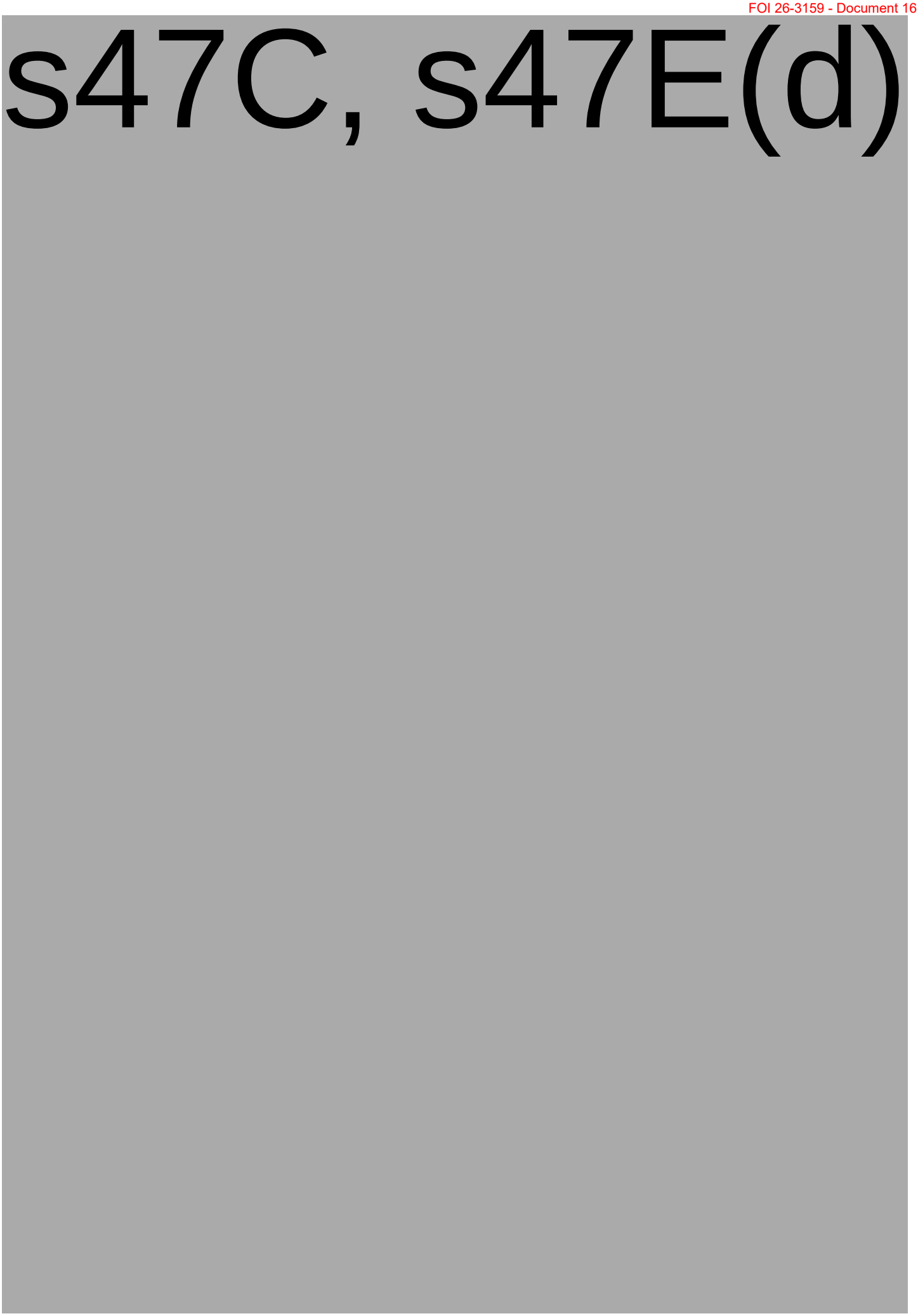
- The majority of Aged Care Needs Assessment Organisations (including State and Territory Governments) have raised concerns about the inability to override the IAT classification algorithm, this includes:

s47E(d), s47C



- Assessment organisations have provided details of cases in which assessors believe the algorithm has generated an outcome that does not align with client needs. The department is analysing these to inform development of advice to assessors and consideration of future updates to the algorithm.

s47E(d), s47C


s47C, s47E(d)

s47E(d), s47C

s47E(c), s47F

**From:** PUGH, Greg
**Sent:** Wednesday, 29 October 2025 7:46 PM
**To:** BLACKWOOD, Rachel
**Cc:** SNOW, Jasmine; KOESASI, Katherine; s47E(c), s47F ; s47E(c), s47F
**Subject:** RE: For clearance - Manual content re override [SEC=OFFICIAL]

OFFICIAL

Happy with this thanks. It is clear on what can and cannot be done.
Greg

---

OFFICIAL

**From:** BLACKWOOD, Rachel
**Sent:** Wednesday, 29 October 2025 3:30 PM
**To:** PUGH, Greg
**Cc:** SNOW, Jasmine ; KOESASI, Katherine ; s47E(c), s47F ; s47E(c), s47F
**Subject:** For clearance - Manual content re override [SEC=OFFICIAL]



OFFICIAL

Hi Greg
Attached for your clearance is our proposed Assessment Manual content on override of the IAT Outcome. Thanks to s47E(c), s47F in Jas' team for providing input to this this morning.
Seeking your clearance of this by noon tomorrow so that it can be included in the final manual to be published on Friday.
Thanks & happy to discuss.
Rachel

**Rachel Blackwood** *[Her/She]*
**Assistant Secretary**
**Single Assessment System Branch**

Access and Home Support Division | Ageing and Aged Care Group
Australian Government Department of Health, Disability and Ageing
T: 02 s47E(c), s47F | E: Rachel.Blackwood@health.gov.au

Executive Assistant: s47E(c), s47F
T: 02 s47E(c), s47F @health.gov.au

*The Department of Health, Disability and Aged Care acknowledges First Nations peoples as the Traditional Owners of Country throughout Australia, and their continuing connection to land, sea and community. We pay our respects to them and their cultures, and to all Elders both past and present.*

***Making flexibility work** - if you receive an email from me outside of normal business hours, I'm sending it at a time that suits me. I'm not expecting you to read or reply until normal business hours.*

## Chapter 5: Accepting the IAT outcome

*Note: this chapter provides guidance to aged care needs assessors*

If an assessor plans to recommend ongoing home support for an older person through Support at Home or CHSP, the IAT Outcome that is generated by the system must first be accepted by the assessor. For example, where the IAT Outcome recommends an ongoing SaH 5 the assessor will accept this IAT Outcome.

If the IAT Outcome results in an ineligibility classification, the assessor must accept this outcome and reflect in the support plan and assessment summary that the person is not eligible to receive government-funded aged care services.

The IAT Outcome is designed to consistently determine an older person's CHSP or SaH classification, or their ineligibility for government-funded aged care services. It is guided by a set of rules that are built into the IAT to generate a classification level (funding) for ongoing home support. The criteria that an older person must meet for each classification level are defined in section 81-10 of the *Aged Care Rules 2025 (the Rules)*.

The IAT Outcome considers a client's needs at three levels:

- Identification of the older person's functional abilities.
- Assessment of how well the older person's functional needs are currently being met.
- Consideration of compounding factors, which introduce additional complexity for a client compared to others with similar functional status and level of met needs.

This approach ensures that people with similar characteristics and functional needs receive the same level of funding to support their aged care needs.



The new system is designed to:

- **Achieve consistency** – so that decisions are not influenced by individual discretion or subjective judgment.
- **Ensure equity** – so that everyone is treated fairly.
- **Build confidence** – so older people and their families can trust that the system is transparent and reliable.

**Note:** Given this new approach, a guidance framework akin to the *Guidance Framework for Home Care Package Leve*l does not exist for assessors to recommend Support at Home classification levels.

**Important:** To support the IAT Outcome recommending a level of care which appropriately addresses an individual's care needs, assessors should ensure all inputs into the IAT are accurate.

**Overriding the IAT outcome**

It will be necessary to override the system-generated IAT Outcome to recommend the:

- SaH Restorative Care Pathway,
- SaH End of Life Pathway,
- Transition Care Program (TCP),
- Permanent Residential Care without ongoing in-home services,
- Residential Respite care without ongoing in-home services.

**Note:** in order to recommend TCP or only residential care (permanent or short-term), assessors will need to override the IAT Outcome to 'ineligible for ongoing SaH/CHSP'. Assessors can then recommend these care types in the support plan.

Once the override button is selected, a screen will display where an assessor can perform these actions. If an assessor overrides the IAT outcome, they will be required to:

- select a reason for overriding the IAT outcome, and
- provide a descriptive reason for overriding.



**Note:**

The IAT Outcome has functionality that allows for particular actions that must not be taken by assessors as these actions do not align with the Rules. This functionality includes:

- a CHSP classification can be overridden to recommend Restorative Care Pathway (RCP) during a comprehensive assessment. In line with section 81-15 of the Rules, RCP cannot be recommended for approval when a Support at Home classification has not been generated by the IAT Outcome.

-the IAT Outcome can be overridden to recommend a different ongoing home support classification (eg. SaH class 5 to a SaH class 6). In line with section 81-10 of the Rules the criteria for each classification is prescriptive and does not allow for an ongoing classification different to the IAT Outcome to be recommended.

It is important that assessors do not take these actions and delegates do not approve recommendations when these actions have occurred.

**Tips for assessors when explaining the IAT outcome and recommended classification level for ongoing home support to older people and their supporters.**

- I have put the information you/<older person's name> have/has given me during your/their assessment into the assessment tool and the system has generated an outcome for your <eligibility for CHSP/level of funding for Support of Home> OR <ineligibility for government-funded aged care services>.
- The system uses a set of rules which rely on information that you/they have told me during your/their assessment which include:
    - Your/their functional ability to undertake daily tasks eg. walking, eating, bathing, toileting, managing their finances, cooking, and shopping, and.
    - the extent to which your/their needs are currently being met, and
    - other factors that may introduce additional complexity for you/them such as sensory concerns, medical conditions and co-morbidities, carer availability, mental health, continence, and vision impairment.
- Using this set of rules, the assessment tool has determined your/their level of funding for ongoing, in-home care.
- This helps to ensure consistency in how funding packages are assigned and means that your/their funding level will be the same as other people who have similar needs and clinical characteristics.
- I have included services in your support plan that will help to meet your goals and needs. Once approved and your funding is assigned to you, you can work with a provider to determine the services you will receive and how often within your classification level (funding).

**Chapter 8: Approving a classification level for ongoing home support.**

*Note: this content is an excerpt from Chapter 8 of the manual and provides guidance for assessment delegates who are delegated powers by the System Governor to approve access to government-funded aged care services.*

## Step 1. Decide if the older person is eligible for home support

Before approving a recommendation for the home support service group, the Assessment Delegate first needs to decide if an older person requires and is eligible to access this service group.

During the assessment, once the IAT is finalised, the IAT Outcome will generate a recommendation for the older person to receive ongoing home support through CHSP or Support at Home. It may also recommend ineligibility for government funded aged care services. As such, the IAT Outcome will guide the Assessment Delegate to determine whether the older person is eligible for ongoing home support through CHSP or Support at Home.

**Note:** An IAT Outcome of ineligibility means that the older person has not met the minimum threshold to receive ongoing home support through CHSP or Support at Home. If the IAT Outcome results in an ineligibility outcome, the assessment delegate must issue a Notice of Decision non-approval letter to the older person.



## Step 2. Decide the classification type and level

The IAT Outcome includes a service group (care type), classification type (duration) and classification level (funding). For example, a person who has been assessed as needing access to ongoing home support services under Support at Home, the approval will be the following:

- **Service group:** Home support
- **Classification type:** Ongoing
- **Classification level:** SAH class (1 to 8)

Section 81-10 of the *Aged Care Rules 2025* provides criteria that an older person must meet to be approved access for ongoing home support through CHSP or Support at Home. These criteria are based on a defined set of rules that has been built into the IAT to generate the IAT Outcome. This means that the IAT Outcome will determine whether the older person meets the criteria in section 81-10 of the Rules and the classification level (funding) for ongoing home support.

Chapter 5 provides guidance to assessors to accept the IAT Outcome if they are intending to recommend ongoing home support services through CHSP or Support at Home. Before approving any recommended classification level, assessment delegates must ensure that the classification level recommended by the assessor is the same as the classification level generated by the IAT Outcome. The system-generated recommendation is labelled 'IAT outcome', and the assessor's recommendation is labelled 'Recommended classification'. If these two values are different, then the assessor has overridden the IAT outcome.

In instances where the assessor has overridden the IAT outcome to another ongoing home support classification (eg. SaH class 4 to SaH class 5), the delegate must disagree with the assessor's recommended classification level and edit it to the classification level recommended by the IAT Outcome.

**Note:**

It will be necessary for the assessor to override the IAT Outcome to recommend the following pathways.

-SaH Restorative Care Pathway,

-SaH End of Life Pathway,

-Transition Care Program,

-Permanent Residential Care without ongoing in-home services,

-Residential Respite care without ongoing in-home services.