Australian Government
Department of Health, Disability and Ageing

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Aged Care Assessment Manual

Version 8.1

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IMPORTANT

The *Aged Care Act 2024* governs the delivery of funded aged care services by registered providers. The information in this manual helps assessment teams to understand the laws around the government-funded aged care system and specifies mandatory and best practice guidance for aged care needs assessment teams to deliver high-quality assessment services.

Parts of this manual summarise multiple legal documents in accessible, simple language, so it doesn't contain every detail of the law. It is not intended as legal or professional advice on interpretation of the legislation or how it applies in individual circumstances.

This manual replaces the *Aged Care Act 2024 Guide for the Single Assessment System* which has been decommissioned. This guide should not be referenced as it contains information that has since been updated.

Additional information and resources that may further support you to understand your responsibilities and obligations are available through the following Australian Government resources:

- Department of Health, Disability and Ageing https://www.health.gov.au
- My Aged Care www.myagedcare.gov.au
- Aged Care Quality and Safety Commission www.agedcarequality.gov.au
- Services Australia http://www.servicesaustralia.gov.au

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Document purpose

This Aged Care Assessment Manual specifies mandatory and best practice guidance for aged care needs assessment teams including assessors, team leaders, triage delegates and assessment delegates. To achieve the delivery of high-quality assessment services, assessment organisations are required to follow the guidance in this manual in the assessment of older people's support and aged care needs and eligibility for government funded aged care services under the *Aged Care Act 2024* (Cth).

In addition to the guidance in this manual, assessors are expected to also use the Aged Care Assessment Quality Framework to deliver a high-quality assessment experience and service for every older person. All assessors, delegates and team leaders are also required to complete the mandatory training outlined in the My Aged Care Workforce Learning Strategy 2025 (and subsequent versions).

The Department of Health, Disability and Ageing will regularly review and update this Manual as required to ensure it remains up to date in the context of system changes and enhancements to the My Aged Care operating model.

Guidance for undertaking residential aged care (RAC) funding assessments is provided in the Australian National Aged Care Classification (AN-ACC) RAC Funding Assessor Training Manual.

Key sources of information to complement this manual include:

- IAT User Guide
- Aged Care Assessment Quality Framework
- Aged Care Act 2024
- Aged Care Rules 2025
- My Aged Care website
- Fact sheets for Assessors
- My Aged Care Assessor Portal resources
- My Aged Care Workforce Learning Strategy
- Support at Home Program Manual for 1 November 2025
- Commonwealth Home Support Program (CHSP) Manual 2025-2027
- Multi-Purpose Service Program (MPSP) Fact Sheets
- National Aboriginal and Torres Strait Islander Flexible Aged Care Program (NATSIFACP) Manual
- Aboriginal and Torres Strait Islander Aged Care Framework
- Support at Home Assistive Technology and Home Modifications (AT-HM) scheme Fact Sheet
- Transition Care Program (TCP) Guidelines
- Support at Home Pricing Resources

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Terminology

Throughout this document:

- The terms 'individual,' 'older person', ‘client’, ‘care recipient’ and 'participant' are used interchangeably to refer to a person who meets the eligibility criteria for an aged care assessment and government funded aged care services under the *Aged Care Act 2024 (the Act)*.
- The term ‘reassessment’ is used throughout this document to describe an assessment that occurs after an older person has already been assessed at least once.
- The terms ‘provider’ or ‘service provider’ are used throughout this document to refer to a ‘registered provider’ as outlined in the *Act*.
- The term ‘assessor’ or ‘needs assessor’ are used interchangeably throughout this document to refer to a person who conducts aged care assessments, for home support and comprehensive assessments.

This symbol displays throughout the document and denotes significant change in information and the assessment process with the introduction of the *Act*.

This symbol displays where there are links to further information and resources.

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Document Structure

Chapter	What you'll find in this chapter	Key Changes from v8 to v8.1
Chapter 1 Aged Care Act 2024	Introduces some key concepts under the *Aged Care Act 2024* that are important to understand. • Changes to eligibility requirements to access aged care services • Service list and structure under *Aged Care Rules 2025* • Approvals under *Aged Care Act 2024* • Transition arrangements	• Definitions of homeless and at risk of homelessness (section 1.4.2) • Inclusion of Transition arrangements to the Aged Care Act (section 1.5) • Update to the alternative entry section to clarify TCP arrangements (section 1.6)
Chapter 2 Overview of My Aged Care and Single Assessment System	Provides information about My Aged Care and the Single Assessment System including: • Introduction of Aboriginal and Torres Strait Islander Assessment Organisations from August 2025 • Assessment Organisation roles and responsibilities • Assessment types • The Integrated Assessment Tool (IAT)	• Information about recording a client's preference for an Aboriginal and Torres Strait Islander Assessment Organisation (section 2.1) • Updates to Supporting Community Engagement about the Aboriginal and Torres Strait Islander pathway (section 2.5) • Further information regarding supporting the broader roll-out of Aboriginal and Torres Strait Islander Assessment Organisations (section 2.5.1) • Multi-disciplinary approach (section 2.8.5) and Aboriginal and Torres Strait Islander people • Inclusion of culturally appropriate Validated Assessment Tools for Aboriginal and Torres Strait Islander people (section 2.11.1)
Chapter 3 Referral, Registration and Screening	Details the referral, registration and screening stages of the assessment journey. Information includes: Registered supporters • Entry into My Aged Care • Registering with my aged care • Screening • Alternative entry (urgent services pathway) • Application for Care form	• Updates to entry into My Aged Care (section 3.1) • Clarification of alternative entry arrangement for TCP (section 3.4) • Updates to Emergency Residential Care- Application for Care (section 3.6)

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Chapter	What you'll find in this chapter	Key Changes from v8 to v8.1
Chapter 4 Referral for Assessment	Details the assessment referral process in the My Aged Care assessor portal including: • Managing and actioning referrals and assigning referral priority, • Managing preference for Aboriginal and Torres Strait Islander assessments • Explaining how priority categories are assigned to different assessments including Home Support, Comprehensive and Hospital Assessments • Using the End-of-Life Pathway 'high priority' referrals in the system • Explaining how assessors can self-refer for eligible and (likely) ineligible individuals. • SPRs and reassessment requests	• Additional information about a client's preference for an Aboriginal and Torres Strait Islander Assessment Organisation (see section 4.3.1) • Additional information about contacting Aboriginal and Torres Strait Islander people before rejecting a referral (section 4.3.8)
Chapter 5 Assessment Activities	Includes important information about how to undertake an aged care needs assessment and complete a support plan for an older person. This chapter includes: • Consent for triage and assessment • Triaging Assessments and Triage Delegate role • Triage for SPRs • Revocation of Eligibility • Undertaking a needs assessment using the IAT • Assessment settings • Clinical attendance • IAT outcome • Recommending service types and services • Converting a home support assessment to comprehensive • Support Plan • Wellness & Reablement • Linking Supports • Assessment wrap-up	• Triage timeframes for Aboriginal and Torres Strait Islander Assessment Organisations (section 5.2) • Informing an eligible younger person of other services (section 5.2.2) • Additional guidance for Triage Delegates to check a person's preference for Aboriginal and Torres Strait Islander Assessment Organisation (section 5.3.1) • Preparing for an assessment with an Aboriginal and Torres Strait Islander person (section 5.3.8) • Confirming an older person's preference for an Aboriginal or Torres Strait Islander Assessment Organisation prior to assessment (section 5.6.1) • Additional information on confirming if an individual identifies as a care leaver (section 5.7) • Guidance on how to use the IAT Outcome (section 5.7.7) • Linking supports- additional information for Aboriginal and

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Chapter	What you'll find in this chapter	Key Changes from v8 to v8.1
		Torres Strait Islander AOs (section 5.10.2) • Making service recommendations - additional information for Aboriginal and Torres Strait Islander Assessment Organisations (section 5.12.1) • Review of Support Plan and Assessment Wrap up - additional information for Aboriginal and Torres Strait Islander Assessment Organisations (section 5.13 & 5.14)
Chapter 6 Aged Care Programs	Includes important information about the aged care programs recommended by assessors to meet an older person's needs and goals. • Introduction of Support at Home Program (classifications 1-8; RCP, EoL, AT-HM • Changes to CHSP and interactions with other programs	• Restorative Care Program (RCP) – information about RCP units (section 6.2) • RCP – call out box advising RCP cannot be recommended with Hoarding and Squalor services (section 6.2.3) • RCP- further information on the interaction between CHSP and RCP (section 6.2.4) • RCP – call out box regarding informing an older person an approval for ongoing Support at Home will end their RCP episode (section 6.2.5) • RCP - Manual oversight of RCP places (section 6.2.6) • Additional information on recommending transition care (section 6.8.2)
Chapter 7 Delegations and approvals under the Act	Includes information about: • The powers under the Aged Care Act 2024 that are delegated to Triage Delegates and Clinical and Non-Clinical Assessment Delegates. • How approvals work under the *Aged Care Act 2024*, and the decisions that delegates make.	• Approval of reasons under the Act – addition of visual summary (section 7.6.1) • Access approval pathway under section 66 of the Act – addition of visual summary (section 7.6.2) • Approvals under section 67 of the Act, person with impairment or sickness – addition of visual summary (section 7.6.3) • Approvals under section 68 individuals with sickness – addition of visual summary (section 7.6.4)

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Chapter	What you'll find in this chapter	Key Changes from v8 to v8.1
Chapter 8 Delegate decisions in practice	Includes guidance for Assessment Delegates covering: • How to make sound, evidence-based decisions • step-by-step processes for approving aged care services across the service groups • Other approvals (including giving approvals after a service has commenced and approving a service without an assessment).	• Additional instructions on reviewing the assessment evidence (section 8.2.3) • Further instructions on deciding if an individual is eligible for home support and deciding a classification type and level (section 8.3.1 and 8.3.2) • RCP- manual oversight of RCP places (section 8.3.2) • Instructions on the AT-HM service seeking status (section 8.4.4) • Alternative entry – instructions regarding recording the emergency care start date (section 8.9.1)
Chapter 9 Finalising the Assessment and Service Referral	Includes guidance about: • Finalising the assessment • Recording and communicating the assessment outcome • Referring the older person for services, • The single provider model for Support at Home (which includes a single referral code for all services/pathways) • Completing the Notice of Decision (approval/non-approval letter).	• End-of-Life Pathway (EOL)- call out box about EoL and receiving the 'Non-approval letter' (section 9.3.1)
Chapter 10 SPRs and Reassessments	Includes guidance on the circumstances for conducting a Support Plan Review (SPR) or a reassessment for each aged care program.	• Additional instructions on prioritising support plan reviews (SPRs) for End-of-Life and second units of restorative care (section 10.1.2)
Chapter 11 Reviewable Decisions, Revocations and Complaints	Provides information on assessment related reviewable decisions in accordance with the *Aged Care Act 2024*. It also details: • The reconsiderations process • Options for reviews and revocations • The complaints process.	• Departmental contact details for assessment related revocations (11.4.1) • Further instructions on corrections after a service referral has been accepted or services have commenced (section 11.5)
Chapter 12	Outlines the ways in which the aged care system supports an older person's diverse needs by ensuring	• Further information on understanding cultural safety for

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Chapter	What you'll find in this chapter	Key Changes from v8 to v8.1
Supporting Diverse Experiences and Needs	they have access to person-centered aged care assessments and services. This includes valuing older people, their identities, cultures, abilities, diversity, beliefs and life experiences.	older Aboriginal and Torres Strait Islander people (section 12.2)
Chapter 13 Operating Procedures	Includes information on privacy, information management and relevant legislation. Also included in this chapter is information about: • Clinical governance • Information management and privacy under the *Aged Care Act 2024* • Framework for governance of Indigenous data • Branding • Resources for consumers • Reporting and performance	• Updates to privacy and protected information under the *Aged Care Act 2024* (section 13.2.1)
Chapter 14 Fees and Payments	Provides guidance on fees, payments and participant contributions for funded aged care services.	• Revised information on fees for older people entering permanent residential care (section 14.2.3) • Revised information on financial hardship (section 14.2.4) • Revised information on fees payable by older people receiving transition care (section 14.2.5)
Appendices	Appendices include: • Overview of changes to assessment processes under the Act • Glossary • Contact Details • Clinical Governance Guidance for Aged Care Needs Assessment Organisations • Clinical attendance • Wellness and Reablement • Restorative Care Case Studies • Aged Care Assessment Workforce Credentials	• New visual that provides an overview of changes in the assessment processes under the *Aged Care Act 2024* (Appendix A) • Additional information for Aboriginal and Torres Strait Islander Assessment Organisations (Appendix G)

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1. Chapter 1: Aged Care Act 2024

What you'll find in this chapter

This chapter introduces some key concepts under the *Aged Care Act 2024* (the Act) that are important to understand. They include:

- The structure of the Act
- Statement of Rights and Principles
- Dignity of Risk
- Eligibility requirements to access government funded aged care services
- Alternative entry
- Service List and structure under the *Aged Care Rules 2025*
- Transition Arrangements for 1 November 2025

All sections in this chapter are new content.

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1.1. About the Aged Care Act 2024

The *Aged Care Act 2024* (the Act) is rights-based legislation designed to put older people at the heart of the aged care system. It includes a Statement of Rights and a Statement of Principles to ensure the focus remains on the needs and well-being of older people. The Act provides a framework to deliver high-quality, safe, and respectful funded aged care services while empowering those who receive them.

The Act upholds these rights through:

- **Strong Legal Foundations**: The Act establishes a person-centred aged care system, and the objects of the Act give effect to Australia's obligations under international human rights treaties, ensuring a robust legal basis.
- **Independent Oversight**: The Act introduces mechanisms for independent system oversight, promoting accountability and fairness within the aged care system.
- **Equitable Access**: It ensures that all individuals are assessed against a culturally safe and appropriate single assessment framework, facilitating fair access to aged care services.

This structure is designed to ensure that aged care services are fair, accessible, and centred on the dignity and rights of older people.

The Act is structured into eight chapters, each focusing on different aspects of the aged care system. These are summarised below.

The most relevant areas of the Act for assessment organisations are in Chapter 2 which explains eligibility and assessment processes, and Chapter 8 which covers reconsiderations, decision reviews, and delegation provisions.

Chapter 1 – Introduction
This Chapter establishes the purpose, objectives, and scope of the Act. It introduces the key principles that underpin the Act, including the Statement of Rights and the Statement of Principles, which recognise the rights, dignity, and autonomy of older Australians. The

Chapter also defines important concepts and terminology used throughout the Act, ensuring consistency in interpretation and application. This Chapter also includes the aged care service list (Prescribed in the Aged Care Rules 2025 in Part 3).

Chapter 2 – Entry to the Australian Aged Care System

This Chapter includes the requirements for an individual to access government-funded aged care services. It details the eligibility criteria for aged care needs assessments, the aged care needs assessment process, and how individuals are approved for services. Additionally, it covers the approach to classifying the level of funding required, how priority for services is established, and the allocation of available aged care places to individuals and providers.

Chapter 3 – Registered providers, aged care workers, and digital platform operators

This Chapter focuses on aged care service providers, aged care workers, and the digital platforms that support aged care services. It sets out the registration process for providers, the approval process for residential care homes, and the conditions and obligations that registered providers must meet. It also outlines requirements for aged care workers, governance structures, and compliance responsibilities, ensuring service quality and accountability.

Chapter 4 – Funding of aged care services

This Chapter details how the Commonwealth funds aged care services, including whether that funding is through subsidies or grant based. This Chapter also sets out the individual fees and contributions that are payable for funded aged care services. It explains the funding structures for home support, assistive technology, home modifications, and residential care services. It also outlines means-testing rules, financial obligations of individuals accessing services, and mechanisms for subsidy payments to registered providers. This ensures a fair and sustainable funding model that aligns with individuals' financial circumstances.

Chapter 5 – Governance of the aged care system

This Chapter establishes the underlying governance of the broader aged care system. It establishes roles such as the System Governor, Aged Care Quality and Safety Commissioner, and Complaints Commissioner, detailing their responsibilities in ensuring compliance, investigating concerns, and enforcing the Aged Care Quality Standards. It also establishes the Aged Care Quality and Safety Advisory Council, who provides expert advice to improve aged care services and regulatory approaches.

Chapter 6 – Regulatory mechanisms

This Chapter outlines the enforcement measures in place to ensure aged care providers comply with legal and quality standards. It details the monitoring and investigation processes, including the use of compliance notices, banning orders, civil penalties, and enforceable undertakings. The Chapter also covers whistleblower protections and the legal mechanisms available to investigate and address regulatory breaches, ensuring transparency and accountability in the sector.

Chapter 7 – Information management

This Chapter establishes the rules for handling aged care data, privacy, and information sharing. It sets out record-keeping requirements for providers and government agencies and outlines protections against the misuse of sensitive personal information. The Chapter also

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introduces whistleblower protections and mechanisms for publishing key information about aged care providers and services, ensuring transparency and public trust in the system.

Chapter 8 – Miscellaneous

The final Chapter covers additional provisions, including the reconsideration (review) and appeal processes available to individuals and providers regarding decisions made under the *Aged Care Act 2024 (the Act*). It details delegation powers, administrative automation, financial provisions, and the Minister's authority to make rules under the Act. This Chapter also mandates periodic reviews of the legislation to ensure it remains effective and responsive to the evolving needs of the aged care sector.

Subordinate legislation

The Act is supported by subordinate legislation the *Aged Care Rules 2025 (the Rules)*. The Rules sit underneath the Act and provide further detail and instruction on how the Act operates. There are two distinct bodies of Rules which will support the Act. Transitional Rules which deal with transitional matters not already addressed by the *Aged Care (Consequential Amendments and Transitional Provision) Act 2024* and the *Aged Care Rules 2025.*

About the new rights-based Aged Care Act | Australian Government Department of Health, Disability and Ageing

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1.2. Statement of Rights and Principles

The Statement of Rights and the Statement of Principles support a person-centred aged care system, ensuring older people receive equitable, safe and quality care.

The Statement of Rights and the Statement of Principles are a reference point for the standard of conduct, duties and obligations for when assessment staff, registered providers and aged care workers deliver funded aged care services.

Figure 2 – Aged Care Act 2024 (Cth) Statement of Rights and Principles

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1.2.1. The Statement of Rights

The Statement of Rights (section 23 of the *Aged Care Act 2024 (the Act)*) is a fundamental part of the person-centred Act and promotes the older person's right to receive safe, high-quality care in the Commonwealth aged care system.

All assessment staff should perform their functions and duties in a way that is compatible with the rights. Of importance, assessment organisations and their assessment staff should ensure that an individual's need for funded aged care services is assessed, or reassessed, in a way that is:

- culturally safe, culturally appropriate, trauma-aware and healing-informed, and
- accessible and suitable for individuals living with dementia or other cognitive impairment.

1.2.2. The Statement of Principles

The Statement of Principles (section 25 of the Act) provide guidance on how the aged care system should operate. It should be used to guide the decisions, actions and behaviours of everyone operating in the aged care system, including assessors, providers, aged care workers, registered supporters and government agencies.

The Statement of Principles also aims to guide government agencies and bodies to ensure that the whole aged care system is directed towards the safety, health, wellbeing, and quality of life of individuals accessing funded aged care services.

1.3. Dignity of risk

During an aged care needs assessment, assessors should work with older people to balance their responsibility for an individual's right to make choices, even if their choices include some risk to themselves. This right is known as 'dignity of risk' which involves:

- Assessors considering the older person's rights mentioned in the Statement of Rights when undertaking an assessment.
- Ensuring older people during an assessment can, where possible, make informed decisions for themselves, including in the setting of goals, including if those decisions involve risk
- The new role of a registered supporter under the *Aged Care Act 2024 (the Act)*, who can support an older person to make and communicate their own decisions regarding their care and preferences.

1.4. Eligibility requirements to access government funded aged care services

From 1 November 2025, all government funded aged care services can only be provided once an older person has been found eligible to undergo an aged care needs assessment by the System Governor (a Triage Delegate) and it has been decided that the individual requires access to aged care services by the System Governor (an Assessment Delegate) following an aged care needs assessment.

This means that all services are Act-based services under the Act from 1 November 2025, including services that an older person accesses through a specialist aged care program (e.g. Commonwealth Home Support Program, Multi-purpose Service Program, National Aboriginal and Torres Strait Islander Flexible Aged Care Program and Transition Care Program).

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1.4.1. Age eligibility requirements

Under the *Aged Care Act 2024*, there are clear eligibility requirements that an individual will need to meet to have an aged care needs assessment. Section 58 of the Act outlines these eligibility requirements.

Note:

To be eligible for an aged care needs assessment an individual must be:

-aged 65 or over; or

-an Aboriginal or Torres Strait Islander person and is aged at least 50; or

-homeless, or at risk of homelessness, and is aged at least 50; and

Each of the above individuals must also provide information relating to the individual's care needs. Care needs are defined under the Act as one or both of the following:

-the individual has difficulty (whether physically, mentally or socially) undertaking any daily living activities;

the individual needs help from another person, or the assistance of an aid, to maintain their physical, mental or social capacity to function independently.

1.4.2. Informing the eligible younger person of other services

There are limited circumstances in which people under the age of 65 can access Australian government aged care services. Under subparagraph 58(c) if the individual is under the age of 65 and falls into one or more of the eligible cohorts, they must:

(i) be informed of any other services that may be available to meet their care needs (noting that it is not a requirement for a person under the age of 65 to take up other services in place of aged care services).
(ii) elect, in the approved form, to be provided with government funded aged care services before they turn 65.

For eligible younger people who make an application via the My Aged Care contact centre, they will be informed of other services at this stage. However, for all other registration pathways, the Triage Delegate will need to inform the eligible younger person of other services. Further information about this process is at section 5.3.2of this Manual.

Note:

The Principles and Guidelines for a younger person's access to Commonwealth funded aged care services will no longer be relevant under the Aged Care Act 2024.

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Definitions for 'homeless' and 'at risk of homelessness'

A person aged 50 years or older who is homeless or at risk of homelessness may be eligible for an aged care needs assessment and access funded aged care services. For Triage Delegates to determine if an individual aged 50 to 64 meets the eligibility criteria for a needs assessment under the homeless or risk of homelessness provision in the *Aged Care Act 2024*, the following definitions apply:

Homeless definition

The term 'homeless' in the context of aged care and for the purposes of receiving a needs assessment and funded aged care services refers to an individual who:

- is aged 50 or older, **and**
- has prematurely aged and requires services for their aged care needs, **and**
- has the following living arrangements:
  - lacks any adequate roof over their head, **or**
  - has no security of tenure, or moves between various forms of temporary or medium-term shelter, **or**
  - stays in accommodation that falls below minimum community standards, **and**
- does not have the means to change their living arrangements.

At risk of homelessness definition

The term 'at risk of homelessness' in the context of aged care and for the purposes of receiving a needs assessment and funded aged care services refers to an individual who:

- is aged 50 or older, **and**
- has prematurely aged and requires services for their aged care needs, **and**
- is at risk of experiencing the following living arrangements:
  - lacks any adequate roof over their head, **or**
  - has no security of tenure, or moves between various forms of temporary or medium-term shelter, **or**
  - stays in accommodation that falls below minimum community standards, **and**
- does not have the means to change their living arrangements.

Once an aged care needs assessment is undertaken, the System Governor (assessment delegate) must ensure that all eligibility requirements are met before approving any service group, service type, or specific funded aged care service.

This means that the older person's situation must meet the conditions outlined in sections 66 to 68 of the *Aged Care Act 2024 (the Act)*, and any additional eligibility criteria set by the relevant *Aged Care Rules 2025* must be satisfied. If these requirements are not met, the System Governor (assessment delegate) cannot approve the provision of aged care services.

As of 1 November, any younger individual[1] already accessing services will not be required to have a reassessment. Younger individuals currently accessing services will be able to continue to access these, even if they are below the minimum age requirements for the Act, subject to any actions required for that individual to transition to the Act.

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1.5. Transition arrangements to the *Aged Care Act 2024*

As part of the commencement of the *Aged Care Act 2024 (the Act)* on 1 November 2025, there are different transitional arrangements for existing clients and new clients being assessed as eligible for aged care programs.

A general 'no worse off' principle applies to all older people who will transition under the Act. Assessors should follow the procedures outlined in Table 1 when managing approvals for this cohort.

[1] A younger individual is a person who is under 50 years old for Aboriginal and Torres Strait Islander people or people who are homeless or at risk of homelessness or under 65 years old for all other persons.

Table 1: Transitional Rules from 1 November 2025

Cohort	Transitional Rules from 1 November 2025
Home Care Package (HCP)	• All HCP recipients transition to Support at Home. - Assigned one of four Transitioned HCP classifications based on their current HCP level. • No Support at Home classification (Levels 1–8) assigned at transition. • Transitional classification can be retained indefinitely, even after reassessment, if more beneficial.
Multi Purpose Services Program (MPSP)	• Home/community services recipients (or those starting within 3 months) automatically approved for: - Ongoing/short-term home support - Assistive Technology (AT) - Home Modifications (HM) • Residential aged care recipients (or those starting within 3 months) approved for ongoing/short-term residential care.
NATSIFACP	• Individuals receiving NATSIFACP services in the 12 months before 1 Nov 2025 are automatically eligible under the Act. • No new assessment required unless care needs change. • All new clients post 1 November are required to make an application for funded aged care services by registering with MAC, undergo a needs assessment and obtain an access approval for one or more service groups in place to access services delivered under NATSIFACP. • However, they can receive NATSIFACP services before assessment if they meet the criteria for alternative entry.
Commonwealth Home Support Programme (CHSP)	• Registered and assessed clients automatically transition and continue accessing services. • Unregistered and unassessed clients must be assessed by 31 October 2025 to continue accessing services. • Grandfathered clients (from pre-2015 programs) who have never been assessed must undergo an assessment. • Under the transitional arrangements and under section 71 of the Act, CHSP clients who have accessed a CHSP service by 31 October 2025 and are awaiting assessment on or after 1 November

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Cohort	Transitional Rules from 1 November 2025
	can have their service approval backdated to 1 November if they are found eligible at assessment
Short Term Restorative Care (STRC) ***(known as RCP from 1 Nov)***	• The STRC Programme will change to the 'Restorative Care Pathway' under Support at Home as of 1 November 2025. • STRC clients who commence their care episode before 1 November 2025, and are still in flight on 1 November, will have their care continue under transitional arrangements. • those approved for STRC that commence their care episode after 1 November 2025, will have their STRC approval converted into an approval for the Restorative Care Pathway. They will also receive approval for assistive technology medium tier and home modifications medium tier. • They will have six months from their STRC approval to access the Restorative Care Pathway/AT-HM. • After this, they will need to be reassessed to access restorative care or AT-HM under the Support at Home program, if eligible.
Younger People	• Younger people already accessing services will not be required to have a reassessment. • Younger people currently accessing services will be able to continue to access these services and also be eligible to be assessed for other aged care services in the future. • Younger people, in the process of applying for aged care services on 1 November, will be eligible to be assessed under relevant criteria within the *Approval of Care Recipients Principles 2014*.
Transition Care Program (TCP)	• Current Transition Care Program clients who continue to receive care across the transition from the old to Act will have their eligibility and approval deemed across. • All new clients post 1 November will be required to have a comprehensive assessment and receive delegate approval, before they are discharged from hospital, to be referred to transition care service provider.
Residential Care	• Existing residents in care on 1 November 2025 will be allocated a place to ensure no payment or continuity of care issues for the provider or older Australian. This cohort of older Australians will not need to do anything to facilitate this allocation. This will happen as part of the transition to the Act. • Older Australians who have been assessed and approved as requiring residential care, prior to 1 November 2025, will be

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Cohort	Transitional Rules from 1 November 2025
	automatically allocated a place and can enter care when they choose to.

1.5.1. Transitioned Home Care Package

All individuals receiving a Home Care Package (HCP) will transition to the Support at Home program. At the point of transition, they will not be assigned a Support at Home classification level (Levels 1–8). Instead, each person will be allocated one of four Transitioned Home Care Package classifications, based on their HCP level prior to 1 November.

Clients can remain on these transitional classifications indefinitely, unless assessed and approved for a Support at Home classification at a higher level. A transitional classification can be retained even if the client has a new assessment and the IAT recommends a Support at Home classification level that would reduce their funding compared to their transitional level. When reassessing transitioned clients, assessors must ensure the transitional classification is retained when it is more beneficial for the client.

Table 2: Transitioned levels and recommended outcomes

Transition level	IAT Outcome	Recommended outcome
Transitioned HCP 1	CHSP Support at Home Classification 1	Retain Transitioned HCP 1
	Support at Home Classification 2-8	Use recommended Support at Home 2-8 Class.
Transitioned HCP 2	CHSP Support at Home Classification 1-2	Retain Transitioned HCP 2
	Support at Home Classification 3-8	Use recommended Support at Home 3-8 Class.
Transitioned HCP 3	CHSP Support at Home Classification 1-5	Retain Transitioned HCP 3

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Transition level	IAT Outcome	Recommended outcome
	Support at Home Classification 6-8	Use recommended Support at Home 6-8 Class.
Transitioned HCP 4	CHSP Support at Home Classification 1-7	Retain Transitioned HCP 4
	Support at Home Classification 8	Use recommended Support at Home 8 Class.

Section 6.7 Classification of the Support at Home Manual.

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1.5.2. Support Plan Reviews for transitioned Home Care Package (HCP) clients

Transitioned HCP clients will continue to be eligible for Support Plan Reviews (SPRs) under the same process currently in place. However, in line with existing procedures, if it is determined that a client's circumstances have changed and they now require services at a higher level, a reassessment will be required.

Under the new program, a higher Support at Home classification level cannot be approved through an SPR — this can only occur following a reassessment and approval from a Clinical Assessment Delegate. When reassessing transitioned clients, assessors will need to ensure that they maintain the transitional classification where it is more beneficial for the older person. This will be flagged in the system on reassessment. If the IAT outcome is a lower classification than the existing active ongoing classification, then a warning message will display to inform the assessor that they can retain the existing classification by clicking the accept button.

When completing an SPR to transition a client to the End-of-Life Pathway, assessors will have the option to convert the client's Transitioned HCP level to End-of-Life once the End-of-Life form has been uploaded and validated. Clients receiving services on the End-of-Life Pathway can also return to their Transitioned HCP level, just as clients in the Support at Home program can return to their previous classification level.

1.5.3. Transitioned Home Care Package recipients and access to the Assistive Technology and Home Modifications scheme

All Home Care Package (HCP) recipients will transition over to Support at Home with approval for Assistive Technology (AT) transitional and Home Modifications (HM) transitional classifications. These approvals enable a transitioned HCP recipient who has not undergone a reassessment and does not have AT-HM funding, to use their HCP unspent funds to purchase equipment, products and home modifications from the AT-HM list. Providers must document and justify the need and reasoning for the purchase and retain all evidence to support the claim.

If a transitioned HCP recipient has no HCP unspent funds and requires AT-HM, the provider can, with consent from the participant, refer them for a new assessment by an aged care needs assessor. Between 1 November 2025 and February 2026, HCP recipients transitioning to Support at Home, that don't have any unspent funds or have insufficient unspent funds to meet their need for assistive technology and home modifications, can agree for providers to supply information indicating any additional funding needs through the AT-HM scheme data collection process, where the department delegate may allocate an AT ongoing and/or AT/ HM low, medium or high short term funding tier.

Where a transitioned HCP recipient has been reassessed under Support at Home and receives approved AT-HM funding, the purchase of assistive technology and home modifications must be first drawn from any HCP unspent funds before the provider can claim from the AT-HM funding account.

All purchases of AT-HM items must align with the participant's needs, be agreed with the participant, be documented in their care plan and meet any prescription requirements, where applicable.

AT-HM List

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1.5.4. Multi-Purpose Service Program (MPSP)

Existing MPSP clients on 1 November 2025

There will be transitional arrangements in place for individuals already accessing services under the MPSP to provide for service continuity.

Individuals assessed as falling within the transitional cohorts outlined in the transitional legislation (based on previous needs assessments and/or information collected from their providers) will be deemed to have relevant service group approvals, and related decisions, in place, as required in order to access funded aged care services under the *Aged Care Act 2024.*

An individual accessing aged care services in a home or community setting through a MPSP provider at transition time, or who has an agreement in place to commence these services

within 3 months of the transition time, will be approved for ongoing and short-term home support, as well as short-term AT and HM.

An individual accessing residential care services in an Multi-Purpose Service facility at transition time, or who has been approved to commence services within 3 months of the transition time, will be approved for ongoing and/or short-term residential care.

Note:

Individuals will have their transitional status confirmed in writing, via a notice given to their provider after 1 November 2025. This letter will also be attached to their My Aged Care Client Record. By June 2026, relevant approvals and referrals will also be retrospectively added to Department of Health and Aged Care systems to facilitate these individuals moving between MPSP and mainstream services in future.

If an older person in one of the transitional cohorts above wants to access mainstream aged care services (outside the MPSP) after 1 November 2025:

if they plan to access mainstream services under a home and community setting: they will need to call My Aged Care and either:

seek to undergo a re-assessment if they only have a MPSP classification level provided at transition time, or

where they already have a transitional HCP classification level, indicate that they are now seeking mainstream services, where they already have a transitional HCP classification level, at which point they will be placed in the Support at Home Priority System's queue based on their priority category and approval date.

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if they plan to access mainstream services in a residential care home, they can commence services with their new provider but will then need to undergo a Residential Aged Care funding assessment (i.e. a classification re-assessment).

A fact sheet is available for people leaving the MPSP to access other services, to ensure they are aware they might need to wait for services to become available and could pay higher fees. The fact sheet also provides more information on the process for people leaving the MPSP, particularly in the interim until their My Aged Care client records are updated in mid-2026.

1.5.5. New Multi-Purpose Service Program (MPSP) Clients post 1 November 2025

To access services delivered under the MPSP After 1 November 2025, all new clients are required to make an application for funded aged care services, undergo a needs assessment and obtain an access approval for one or more service groups in place to access services delivered under the MPSP..

There is also a specific workflow assessors will need to follow to ensure they can generate a referral to an MPSP provider - that is, a service recommendation must be added in addition to recommendations for residential care, home support, AT and/or HM services. The one referral code will cover any services delivered at or through A MPS facility.

Note: For clients who have been assessed post 1 November 2025 and want to leave their MPSP provider and access mainstream aged care services:

if they plan to access mainstream services under a home and community setting: they will need to call My Aged Care and indicate that they are now seeking mainstream services at which point they will be placed in the Support at Home Priority System's queue based on their priority category and approval date (a reassessment may also be required if they have had a significant change in circumstances)

if they plan to access mainstream services in a residential care home: they can commence accessing services through the new home but will then need to undergo a Residential Aged Care funding assessment (i.e. a classification re-assessment).

A fact sheet is available for people leaving the MPSP to access other services, to ensure they are aware they might need to wait for services to become available and could pay higher fees. The fact sheet also provides more information on the process for people leaving the MPSP.

Fact sheet: Leaving the Multi-Purpose Service Program (MPSP) – Consumer fact sheet | Australian Government Department of Health, Disability and Ageing

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1.5.6. National Aboriginal and Torres Strait Islander Flexible Aged Care Program (NATSIFACP)

Existing NATSIFACP clients

There will be transitional arrangements in place for individuals who have accessed services under the NATSIFACP in the 12 months leading up to 1 November 2025 to ensure service continuity.

Individuals assessed as falling within the transitional cohorts outlined in the transitional legislation (based on previous needs assessments or information collected from their providers via the six-monthly Service Activity Reports) will be deemed to have relevant service group approvals, and related decisions, in place, as required in order to access funded aged care services under the *Aged Care Act 2024.*

However, if these clients move to a different provider or a different location where NATSIFACP services are not available, they may require an aged care needs assessment. It will depend on whether they only have a National Aboriginal and Torres Strait Islander Flexible Aged Care Program (NATSIFACP) default classification level, the service types they require and the range of programs available at their new location.

Note:

Individuals will be notified of their status post 1 November 2025 in writing via a notice given to their provider. This letter will also be updated to their My Aged Care Client Record in late 2025, and relevant service recommendations and referrals will also be retrospectively added to Department of Health, Disability and Ageing's systems at this time.

If an older person in one of the transitional cohorts above wants to access mainstream aged care services post 1 November 2025:

if they plan to access mainstream services under a home and community setting: they will need to call My Aged Care and either:

seek to undergo an aged care needs assessment if they only have a default NATSIFACP classification level provided at transition time, or

indicate that they are now seeking mainstream services, where they already have a transitional HCP classification level, at which point they will be placed in the Support at Home Priority System's queue based on their priority category and approval date.

if they plan to access mainstream services in a residential care home: they will need to undergo a Residential Aged Care funding assessment (i.e. a classification re-assessment) and an aged care assessment if they have not had one previously.

New National Aboriginal and Torres Strait Islander Flexible Aged Care Program Clients post 1 November 2025

All new clients post 1 November are required to make an application for funded aged care services, by registering with MAC, undergo a needs assessment and obtain an access approval for one or more service groups in place to access services delivered under NATSIFACP. However, they can receive NATSIFACP services before assessment if they meet the criteria under alternative entry provisions.

1.5.7. Commonwealth Home Support Program (CHSP)

Registered and assessed Commonwealth Home Support Program (CHSP) clients will automatically transition under the Aged Care Act 2024 (the Act) on 1 November 2025. These clients will continue accessing their current CHSP services in line with their assessed need, without taking any action.

Unregistered and unassessed clients must have registered with My Aged Care and be assessed as eligible for the CHSP by 31 October 2025, to continue accessing government funded aged care services from 1 November 2025.

Note:

Backdating is available for CHSP clients who applied for an assessment before 1 November

Transitional rules have been drafted to enable backdating of approvals if unassessed clients apply for an assessment by 31 October.

This means all current CHSP clients who are assessed as eligible after the commencement of the new Act can have their CHSP approvals backdated to November.

Grandfathered clients (clients receiving services through a previous program who were grandfathered into the CHSP) that have not since undergone an assessment will need to do so to continue receiving services.

1.5.8. Short-Term Restorative Care (STRC) Programme

The Short-Term Restorative Care (STRC) Programme will change to the 'Restorative Care Pathway' under Support at Home. Transition arrangements for people accessing STRC or who hold an active approval for STRC apply to two cohorts including:

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- STRC Programme participants who commence their care episode before 1 November 2025 and are still in flight on 1 November. These participants will have their care continued under transitional arrangements.

- Participants approved for the STRC Programme but commence their care episode after 1 November 2025. These participants will have their STRC approval converted into an approval for the Restorative Care Pathway.

    - They will also receive approval for assistive technology medium tier and home modifications medium tier. They will have six months from their STRC approval to access the Restorative Care Pathway/AT-HM.

    - After this, they will need to be reassessed to access restorative care or AT-HM under the Support at Home program, if eligible. A second unit of funding to use within a single Restorative Care Pathway episode can be requested via a Support Plan Review request.

    - The assessor will need to self-refer this to undertake a reassessment to grant access to a second unit of funding. This is because the ability to add a second unit via SPR will not be available on the assessor portal for those with an STRC approval. The reassessment can be done over the phone and does not require queuing for a face-to-face assessment. While the system may allow a 'third' unit of concurrent RCP funding to be requested by the provider, assessors should check to ensure a person is not approved for another unit once the initial and second have been approved.

    - Requests for higher levels of AT funding will also need to follow this process. Please note, a request for high-tier AT will require recommendation and also approval for a Support at Home classification. Approval for RCP will result in a second unit of RCP funding being given and all evidence requirements must be met. Approval for an ongoing Support at Home classification will conclude their RCP episode.

Guide for Short-Term Restorative Care providers transitioning to the Restorative Care Pathway | Australian Government Department of Health, Disability and Ageing

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1.5.9. Transition Care Program (TCP)

Current TCP clients who will continue receiving transition care from 1 November 2025

Current Transition Care Program clients who continue to receive care across the transition to the Act will have their eligibility and approval deemed across.

New TCP Clients post 1 November 2025

All new clients post 1 November will be required to have a comprehensive assessment and receive delegate approval, before they are discharged from hospital, to be referred to transition care service provider.

1.5.10. Residential Care

Current residential care clients who will continue receiving residential care from 1 November 2025

Existing residents in care on 1 November 2025 will be allocated a place to ensure no payment or continuity of care issues for the provider or older Australian. This cohort of older Australians will not need to do anything to facilitate this allocation. This will happen as part of the transition to the Act.

Prospective residents with a residential care approval but not in care on 1 November 2025

Older Australians who have been assessed and approved as requiring residential care, prior to 1 November 2025, will be automatically allocated a place and can enter care when they choose to.

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1.5.11. Younger People

Younger people receiving existing aged care services

As of 1 November, any younger individual[2] already accessing services will not be required to have a reassessment. Younger individuals currently accessing services will be able to continue to access these, even if they are below the minimum age requirements for the *Aged Care Act 2024* (the Act), subject to any actions required for that individual to transition to the Act.

A “no worse off” principle will also apply to individual contributions for younger individuals transitioning to receiving services under the Act. Should the care needs of younger individuals change post 1 November 2025, they will be eligible for reassessment to access residential aged care. These individuals may be eligible for reassessment for other aged care services based on program level transition rules.

[2] A younger individual is a person who is under 50 years old for Aboriginal and Torres Strait Islander people or people who are homeless or at risk of homelessness or under 65 years old for all other persons.

Younger people with 'In-flight assessments'

Younger individuals who are applying for residential aged care and have provided enough information in My Aged Care to show they began the process before 1 November 2025 will be 'Reviewed and Approved' based on the eligibility criteria under the *Aged Care Act 1997*.

Ability First Australia (AFA) (for younger people who are not NDIS participants) or the NDIA YPIRAC team (for NDIS participants) helps younger people explore age-appropriate options before they seek access to residential aged care – as per section 11A of the *Approval of Care Recipients Principles 2014* (the requirement of specified evidence).

A younger person who has registered with these services on or before 31 October but is yet to register with My Aged Care is still considered to have commenced an assessment process so will still be eligible to receive an assessment post 1 November. The AFA and NDIA reports will clearly document the date on which the younger person commenced registration with the service.

Younger people who are new aged care clients as of 1 November 2025

As of 1 November, if a person aged under 65 (who is not Aboriginal and Torres Strait Islander, homeless or at risk of homelessness and aged 50+) has not commenced the process of applying for aged care services (including registering with AFA or the NDIA YPIRAC team), they are not eligible for an assessment for aged care services.

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1.6. Alternative entry

Under section 71 of the Act, an older person can access aged care services prior to an assessment occurring under 'alternative entry' pathways.

Three circumstances for 'alternative entry' are outlined in **subsection 71(4)**:

- **Urgent services**: The individual was in urgent need of access to funded aged care services and there was a significant risk of harm to the individual if services were not provided before an approval was given;
- **Lack of availability of culturally safe assessments**: The individual is an Aboriginal and/or Torres Strait Islander person and at the time the individual sought access to funded aged care services, there was a lack of availability to access a culturally safe assessment
- **Services commenced through a specialist aged care program and there is a significant delay in assessment**: The individual started to receive care from a specialist aged care program (such as CHSP, MPSP or NATSIFACP) before approval was given and at the time the individual sought funded aged care services there was a significant delay in the availability to undertake a needs assessment.

To access any of the alternative entry pathways, an individual must apply for an assessment in an approved form within the time period specified in the Act and *Aged Care Rules 2025*.

Individuals have a period of 5 days after the day services commenced to make an application under section 71 of the Act. The *Aged Care Rules 2025* specify one exception, if the registered provider delivering services is a NATSIFACP or MPSP provider. In this instance the individual has 30 days after the day on which care commenced to make an application.

Note that, because eligibility criteria for the Transition Care Program (TCP) requires the individual to have an assessment in a hospital setting before they are recommended TCP, TCP cannot be accessed through alternative entry.

Further information on alternative entry is available in Chapter 3.

1.7. Aged Care Service List

The Act provides for the delivery of funded aged care services to individuals under the Australian aged care system. Section 8 of the Act states the *Aged Care Rules 2025* must prescribe a list of services for which funding may be payable under the Act.

The *Aged Care Rules 2025* lists and describes each service and specifies the service group and the service type it is in.

The Aged Care Service List divides the funded aged care services into a variety of **service types**. The **services** within a service type are to be delivered by registered providers through **service groups**.

The Aged Care Service List provides a clear reference for registered providers, funding authorities, and regulatory bodies, ensuring consistency and transparency in aged care service delivery.

The Aged Care Service List serves several key functions:

- **Defining Funded Services:** The list specifies which aged care services qualify for government funding, ensuring clarity for registered providers and older people.
- **Service Categorisation:** Services are grouped under various service types and are delivered under the different service groups.
- **Regulatory Compliance:** The list supports oversight by ensuring that only registered providers (or associated providers of those registered providers) can deliver funded aged care services listed under the service list, in alignment with the Act's broader regulatory framework.

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It is important for assessment delegates to understand the different types of funded aged care services that require approval under the Act, as well as the specific responsibilities and limitations involved in approving each service, service type and service group.

1.8. Service groups

Funded aged care services are categorised into **four service groups**, which specify the setting and nature of care an individual can access.

Table 3: Detail of the four service groups for funded aged care services

Service Group	Setting and nature
Home Support	• Designed to assist older people in remaining independent at home. • Includes service types such as personal care, domestic assistance, social support, meals. • Must be delivered in a home or community setting.
Residential Care	• Provides 24-hour support for individuals with high or complex care needs. • Includes ongoing (permanent) and short-term (respite) classification types • Includes: Personal Care: Assistance with daily activities like bathing, dressing, eating, and mobility. Health Care: Access to nursing care, medication management, and sometimes allied health services. Social Support: Opportunities for social interaction, recreational activities, and community engagement. Safety and Supervision: Staff are available around the clock to ensure residents' safety and respond to emergencies. • Must be delivered in an approved residential care home.
Assistive technology	• Covers equipment and products that enable or enhance independence. • Examples include walking frames, personal alarms, and communication devices. • Must be delivered in a home or community setting.

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Service Group	Setting and nature
Home modifications	• Adjustments made to a person's home environment to enhance safety and accessibility. • Includes ramps, handrails, bathroom modifications, and similar adaptations. • Must be delivered in a home or community setting

Note:

Section 10 of the Act gives more information about the settings where care can be provided, including what *a residential care home* and a *home or community setting* mean.

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1.9. Approvals under the *Aged Care Act 2024*

There is a conceptual shift in the way that the Act describes and groups together approvals. Rather than focusing on programs, approvals under the Act revolve around three primary components that, when combined, are comparable to 'being approved for a program' under the *Aged Care Act 1997*. The components are 'Service group', 'Classification type' and 'Classification level' (sometimes simply referred to as 'Classification'). A priority category is also applied in some circumstances.

- **Service groups** specify the setting and nature of care an individual can access. There are four service groups: **home support**, **assistive technology**, **home modifications** and **residential care**.
- **Classification types** differentiate the time period that services are delivered for under the service group. There are three classification types: **ongoing**, **short-term** and **hospital transition**. Each classification type has a different purpose in meeting the needs of an individual and so are funded and timed accordingly.
- **Classification levels** determine the amount of funding available to deliver the aged care services that an individual has been approved to access under a service group.

The table below compares some examples before and after the introduction of *Aged Care Act 2024.*

Table 4: Comparison of program approval structure between Aged Care Act 1997 and Aged Care Act 2024

Before the introduction of the *Aged Care Act 2024*	**After the introduction of the *Aged Care Act 2024*, the older person is approved for…**
Home Care Package Level (1 4)	Service group: Home support Classification type: Ongoing Classification level: SAH (Support at Home) Class (1-8)
Commonwealth Home Support Package (CHSP)	Service group: Home support Classification type: Ongoing Classification level: CHSP Class
Goods Assistive Technology (GEAT) and Home Modifications (CHSP)	Service group: Assistive technology, Home modifications Classification type: Short-term Classification level: AT CHSP, HM CHSP
Residential respite care	Service group: Residential care Classification type: Short-term Classification level: Respite Class (1-3)
Short term Restorative Care Programme	Service group: Home support Classification type: Short-term Classification level: SAH Restorative Care Pathway

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The following sections show the possible combinations of classification type and classification level a person can be approved for under each service group.

Decisions for service group and classification type are made under section 65(2) of the Act. Decisions for classification level are made under section 78 of the Act.

Table 5: Service group: Home support

Service group	Classification type	Classification level
Home Support	Ongoing	CHSP class Support at Home (SAH) class 1 to 8
	Short-term	SAH restorative care pathway SAH end-of-life pathway
	Hospital transition	Home Support Hospital Transition class (HS HT class)

Table 6: Service group: Assistive technology

Service group	Classification type	Classification level
Assistive technology	Ongoing	Assistance dogs
	Short-term	AT CHSP AT low AT medium AT high
	Hospital transition	AT HT class

Note: classification levels are also referred to as 'funding tiers' in the Support at Home program.

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Table 7: Service group: Home modifications

Service group	Classification type	Classification level
Home modifications	Short-term	HM CHSP HM low HM medium HM high

Note: classification levels are also referred to as 'funding tiers' in the Support at Home program.

Table 8: Service group: Residential care

Service group	Classification type	Classification level
Residential Care	Ongoing	Class 0 Class 1 to Class 13
	Short-term	Class 0 Respite class 1 (101), Respite class 2 (102) and Respite class 3 (103)
	Hospital transition	RC HT class

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Note: 'Class 0' is a default classification applied before the client has been assessed for their classification level.

1.10. Deciding if the older person requires aged care services

After an individual has been determined as eligible for an aged care needs assessment, an Assessment Delegate (System Governor) determines whether the assessed individual requires access to funded aged care services, and which service groups, and in some cases service types and services they require. This requirement is set out in subsection 65(2) of the Act.

This decision is made based on:

- An assessment report (referred to in practice as the Support Plan),
- In the case of reassessments in accordance with subparagraph 64(1)(c)(ii) of the Act, any relevant information relating to the individual provided.

The table below summarises the sections of the Act that relate to eligibility for access to services. These sections of the Act, and how they apply to an Assessment Delegate's decision-making, are explained in detail in Chapters 7 and 8.

Table 9: Approval to access funded aged care services under section 65

Section of the Act	Criteria	Available Service Group/s	Available classification type/s	Relevant program/s
66	Individual must be an Aboriginal or Torres Strait Islander person The individual must meet any eligibility requirements prescribed by the rules for the relevant service group.	• Residential Care • Home Support • Assistive Technology • Home Modifications	All classification types	All programs, but in particular NATSIFACP*
67	Individual must have an impairment; **and** There must be a specific reason why the individual requires access to the service type/s or services. The individual must meet any eligibility requirements prescribed by the rules for the relevant service group.	• Home Support • Assistive Technology • Home modifications	All classification types	• Support at Home • CHSP • TCP • MPSP • NATSIFACP

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Section of the Act	Criteria	Available Service Group/s	Available classification type/s	Relevant program/s
68	Individual must have a continuing need for residential care because they are 'sick' The individual must meet the eligibility requirements prescribed by the rules for the service group residential care.	• Residential Care	All classification types	• Residential care (ongoing or short-term) • TCP • MPSP • NATSIFACP

Important:

If the older person is an Aboriginal or Torres Strait Islander person, an Assessment Delegate only needs to approve them for one or more service groups. They are automatically approved for all the service types and services in any service group they are approved for.

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1.10.1. Approvals for service types and services

The Aged Care Service List service is defined in the Aged Care Rules 2025. It lists the four service groups, and the service types and services within them. See Chapter 7 for further information on how service types and services are approved for different cohorts and across different service types.

1.10.2. Approvals for priority categories

The priority categories assigned to individuals (under section 86 of the Act) determine when certain services are allocated under section 92 of the Act. These categories are based on the assessed urgency of need, complexity of care requirements, and potential risks associated with delayed support. Please see Chapter 7 for further information on how priority category decisions are made.

1.10.3. Period of effect of approvals

Each access approval, classification level, and priority category has a period of effect that is prescribed under the Act. This means that these approvals remain in effect for the period of time specified by the Act, unless the approval is revoked or a reassessment occurs resulting in a new approval.

In addition to the other legislative requirements described above, for an older person to receive funded aged care services, they need both:

- an access approval that is in effect (or 'active'), and
- a classification level that is in effect.

Periods of effect for an approval for your decisions are detailed in sections 71, 80 and 89 of the Act.

Please see Chapter 7 for further information on how periods of effect apply to access approval, classification level, and priority category.

1.11. Accessing funded aged care services

Under the *Aged Care Act 2024 (the Act),* older people will access funded aged care services through the following:

- **Commonwealth Home Support Program (CHSP)**: Offers entry-level in-home care services to assist older people with daily tasks, promoting independence and community connection.
- **Support at Home program**: Assists older people in maintaining independence by providing in-home care services, assistive technology and home modifications, enabling them to live safely and comfortably in their own homes.
- **Residential Care**: Provides accommodation and 24-hour support in aged care facilities for individuals requiring continuous care on either a permanent or short-term basis.
- **Transition Care Program (TCP)**: Offers short-term goal-oriented therapy focused care for older people after a hospital stay, aiming to improve their independence and confidence.
- **Multi-Purpose Service Program (MPSP)**: Provides integrated health and aged care services for older people in small rural and remote communities, allowing them to stay close to family and friends while receiving necessary support.
- **National Aboriginal and Torres Strait Islander Flexible Aged Care Program (NATSIFACP)**: Funds organisations to provide culturally safe aged care services for older Aboriginal and Torres Strait Islander people, allowing them to be cared for close to home and community.

Note:
CHSP, TCP, MPSP, NATSIFACP are defined as a specialist aged care program under the Act.

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Older people do not need to be separately approved under the Act to access services through MPSP or NATSIFACP. Rather these services are added as a service recommendation in the client's Support Plan to accompany the service group, classification.

1.12. Where approvals can be used

Some approvals can be taken to more than one type of program or provider. This is part of how the Act gives more flexibility to tailor the response to the individual.

For example, some people may choose to access their approved services through MPSP or NATSIFACP. Where this is recommended, a referral to a relevant provider will be made alongside the approval.

Note:
If an older person accesses services through MPSP or NATSIFACP, the classification level will not restrict the type or amount of services that can be provided to the person.

The table below shows where the different approval combinations can be used.

You don't need to remember all of the details below – the systems, tools and templates you use will take these into account and/or prompt you when needed.

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Table 10. Service group, classification type and classification level approval combinations

Program	Service group – Classification type Classification level
Commonwealth Home Support Program (CHSP)	Home support – ongoing - CHSP class Assistive technology – short-term – AT CHSP Home modifications – short-term – HM CHSP
Support at Home program	Home support – ongoing – SAH class 1 to 8 Home support – short-term – SAH restorative care pathway Home support – short-term – SAH end-of-life pathway Assistive technology – ongoing – assistance dogs Assistive technology – short-term – AT low, AT medium, AT high Home modifications – short-term – HM low, HM medium, HM high
Residential Aged Care	Residential care – ongoing – 0 to 13* Residential care – short-term – 0 to 3
Transition Care Program (TCP)	Home support – hospital transition – HS HT class Assistive technology – hospital transition – AT HT class Residential care – hospital transition – RC HT class

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Program	Service group – Classification type Classification level
Multi Purpose Service Program (MPSP)	Home support – ongoing - CHSP class Home support – ongoing – SAH class 1 to 8
National Aboriginal and Torres Strait Islander Flexible Aged Care Program (NATSIFACP)	Home support – short-term – SAH restorative care pathway Home support – short-term – SAH end-of-life pathway Assistive technology – short-term – AT CHSP Assistive technology – short-term – AT low, AT medium, AT high Home modifications – short-term – HM CHSP Home modifications – short-term – HM low, HM medium, HM high Residential care – short-term – 0 to 3 Residential care – ongoing – 0 to 13

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* Following a client's admission to permanent residential care, a residential aged care funding assessor will conduct an assessment using the Australian National Aged Care Classification (AN-ACC) assessment tool, which will result in a classification level determined by a proprietary algorithm.

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2. Chapter 2: Overview of My Aged Care and the Single Assessment System

What you'll find in this chapter

This chapter provides information on the Single Assessment System including:

- My Aged Care
- Single Assessment System
- Aboriginal and Torres Strait Islander Assessment Organisations
- Assessment Organisation roles and responsibilities
- Home Support Assessments
- Comprehensive Assessments
- The Integrated Assessment Tool (IAT)

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2.1. My Aged Care

My Aged Care aims to make it easier for older people, their families, and carers to access information on aged care, have their aged care needs assessed, and be supported to locate and access services.

The key elements of My Aged Care include:

- Access to My Aged Care for older people, their families, registered supporters or carers by:
    - calling My Aged Care on 1800 200 422 (FreeCall*) from 8am to 8pm Monday to Friday or 10am to 2pm Saturday (local time).
    - visiting the My Aged Care website (www.myagedcare.gov.au)
    - booking a face-to-face appointment with an Aged Care Specialist Officer (ACSO), located in some Services Australia service centres by calling 1800 227 475
    - contacting a Care Finder or Elder Care Support Worker who will assist them to navigate the aged care system.
- a My Aged Care Service Provider and Assessor Helpline (1800 836 799)
- An aged care needs assessment to identify an older person's needs using the IAT and an access approval to access government funded aged care services.

My Aged Care is supported by a customer relationship management system that includes:

- a central older person record that will include each older person's current aged care requirements and associated history and services provided through My Aged Care
- ability to request, register and end registered supporter relationships
- a referral capability that enables the contact centre, ACSOs and assessors to find appropriate assessment, home support, residential and community support services or resources for older people
- web-based portals for older people (My Aged Care Online Account), assessors, service providers and support organisations.

Assessment organisations can use the My Aged Care assessor portal to:

- manage their assessment organisation contact details and set up individual staff members with access to the My Aged Care assessor portal
- manage referrals for assessment
- submit and action requests to create to register or end supporter relationships and create organisation agent relationships
- complete triage and determine eligibility for an aged care needs assessment
- undertake assessments using the IAT and develop a Support Plan
- make delegate decisions for access to government-funded aged care services
- conduct Support Plan Reviews (SPRs) and request reassessments
- refer older people for aged care services
- recommend a period of reablement or for linking support on the Support Plan
- review and update older person records consistent with the assessment and Support Plan outcomes.

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My Aged Care is committed to supporting older Aboriginal and Torres Strait Islander people and their carers by making it easier to access aged care assessment services that are respectful of culture, community, and connection to Country. Through Aboriginal and Torres Strait Islander assessment organisations, assessment services recognise the importance of cultural safety, trust, and relationships. Information, assessment and support will also be delivered in ways that promote wellbeing.

In addition to the standard ways that older Aboriginal and Torres Strait Islander people, their families and carers can access My Aged Care, Aboriginal and Torres Strait Islander led support such as Elder Care Support Program, can also help facilitate access to My Aged Care services and assessments. This will help to ensure that older Aboriginal and Torres Strait Islander people and their carers receive support in a trusted and culturally safe environment.

In anticipation of the phased implementation of Aboriginal and Torres Strait Islander Assessment Organisations from August 2025, older Aboriginal and Torres Strait Islander people have been able to indicate their preference to have their assessment delivered by an Aboriginal and Torres Strait Islander assessment organisation since February 2025.

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Client's preference to be assessed by an Aboriginal and Torres Strait Islander organisation can be captured at multiple points along the client journey. It may be captured when registering a client in the My Aged Care system, confirmed when completing demographic details during the triage stage of an assessment. It may also be noted by an assessor during an assessment. Once recorded, the preference will display in the client's profile and on the client's card.

It is recognised that building trust can take time, particularly for older Aboriginal and Torres Strait Islander people who may need to feel safe and comfortable before sharing personal or sensitive information with assessors. To support this, assessments may be conducted over multiple sittings if required to allow the process to proceed at a pace that respects the older person's readiness and preferences. During this period, assessors are expected to maintain regular contact with the older person to ensure continuity while the assessment remains active. This ongoing engagement helps foster trust and continuity and ensures that the older person feels supported throughout the process.

Note:

My Aged Care assessor portal users are reminded that they are subject to several obligations when handling information in the Portals. This includes obligations under the Privacy Act 1988 (Cth) and where relevant the Aged Care Act 2024 (Cth).

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2.2. Single Assessment System

The Single Assessment System came into effect in July 2024, with the IAT introduced on 1 July and the Single Assessment System workforce introduced in December 2024. It provides a single aged care assessment pathway for older people to access aged care services. This included the phased implementation of Aboriginal and Torres Strait Islander Assessment organisations from August 2025. The system has been established to respond to Recommendations 28 and 48.2(b) of the Royal Commission into Aged Care Quality and Safety to make it easier for older people to access culturally safe aged care assessments and adapt services as their needs change.

The Australian Government delivers aged care assessments through the Single Assessment System workforce. Aged care assessments are delivered by a mix of state and territory governments, for-profit organisations, not-for-profit organisations, Aboriginal Community Controlled Health Organisations (ACCHOs) and private sector providers.

Under the Single Assessment System, assessment organisations have a mix of clinical and non-clinical assessment staff and conduct both home support and comprehensive assessments. Each assessment organisation is multidisciplinary and may include a range of health-related disciplines. Some assessment organisations may also deliver residential aged care funding assessments using the Australian National Aged Care Classification (AN-ACC) assessment tool.

Assessment organisations are responsible for the day-to-day operation of the Single Assessment System including the timely delivery of assessments under the *Aged Care Act 2024* (the Act), as well as the management, training, and performance of individual assessors and delegates.

The department has responsibility for the Single Assessment System, including providing advice on Australian Government policy, the monitoring and reporting of performance

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against agreed service levels, and the management of regulatory and other administrative processes relating to the Act.

The department and assessment organisations are jointly responsible for training assessment organisation staff, establishing communication protocols, working cooperatively to develop nationally consistent approaches to Single Assessment System workforce operations, and participating in regular forums to support the national administration of the Single Assessment System.

With assessment organisations having a mixed clinical and non-clinical workforce, it is a requirement that all assessment organisations have effective clinical governance operationalised through a clinical governance framework. The department has provided guidance in Appendix D which aims to help assessment organisations to implement effective clinical governance. The guidance describes the importance of good clinical governance, details the elements of an effective clinical governance framework in an aged care needs assessment context and outlines the minimum supports that must be in place to support clinical and non-clinical staff.

2.3. Aboriginal and Torres Strait Islander assessment organisations

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Older Aboriginal and Torres Strait Islander people experience barriers to accessing aged care services, which can prevent them from receiving the care they need.

Aboriginal and Torres Strait Islander assessment organisations are being established in response to Royal Commission Recommendation 28 and 48.2(b) to *'ensure, wherever possible, that aged care assessments of Aboriginal and Torres Strait Islander people are conducted by assessors who are Aboriginal or Torres Strait Islander people, or others who have undertaken training in cultural safety and trauma-informed approaches'.*

The vision for Aboriginal and Torres Strait Islander assessment organisations is to create a culturally safe and empowering environment. This pathway aims to make it easier for older people to access clear and relevant information about aged care assessment; have their needs assessed in a responsive and respectful manner; and, be supported in locating and accessing aged care services that align with their aged care needs and preferences.

Aboriginal and Torres Strait Islander assessment provides a dedicated pathway that is more culturally appropriate and attuned to the cultural needs of older Aboriginal and Torres Strait Islander people. Embedding cultural safety into the assessment process will help improve the experience of older Aboriginal and Torres Strait Islander people, as well as their families and carers, thereby encouraging the uptake of aged care services by older Aboriginal and Torres Strait Islander people. This will support them to maintain their independence at home for longer.

From August 2025, a small number of Aboriginal and Torres Strait Islander aged care assessment organisations started delivering culturally safe, trauma aware and healing informed aged care assessments. This pilot is part of a phased rollout and over time, future phases will cover more areas across Australia.

These organisations provide older Aboriginal and Torres Strait Islander people:

- an improved assessment experience

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- options to stay at home for longer.
- more choice when seeking culturally safe aged care assessment.

Aboriginal and Torres Strait Islander assessment organisations work closely with local Aboriginal and Torres Strait Islander community organisations, and support networks such as Aboriginal Community Controlled Organisations, Aboriginal Community Controlled Health Organisations, and the Elder Care Support program. They work together to promote, educate and encourage the older Aboriginal and Torres Strait Islander people and their community to identify their needs and consider how aged care can help them age well and support them to stay at home and on Country longer.

This network will also help older Aboriginal and Torres Strait Islander people engage safely with the aged care system and help receive supports they need. Older Aboriginal and Torres Strait Islander people can access aged care needs assessments through the existing assessment organisations, or, once established, through an Aboriginal and Torres Strait Islander assessment organisation if available in their area.

Aboriginal and Torres Strait Islander Assessment Organisations are responsible for equipping their workforce to deliver culturally safe, trauma aware and healing informed assessments in communities that are covered in their service regions. This may include training on local customs, protocols and kinship obligations.

Aboriginal and Torres Strait Islander Assessment Organisations are expected to:

- conduct culturally safe, trauma aware and healing informed assessments using yarning and flexible approaches to build trust with the older Aboriginal and Torres Strait Islander person. Assessments may be delivered at a location that the older person feel most at ease and comfortable.
- With client's consent, involve the client's family members, advocates, registered supporter/s or other people who support the client in the assessment process with the client's consent and/or in line with the client's will and preferences.
- connect with the older person's GP, service provider and support networks to help inform an assessment, to gain a comprehensive understanding of the client's health and wellbeing, minimising the older person having to tell their story multiple times.
- be embedded within the local community. Connecting with the local community with their knowledge of local services, customs and protocols will allow them to support matching appropriate assessors to the older people preferences and needs.
- maintain a connection with the older person for the whole journey through to receiving services via assessors and/or Elder Care Support workers. This will help to manage any uncertainty or questions throughout the process.
- work with organisations that support stolen generation survivors and their families.
- provide interpreting services, when needed.
- Support clients to access services they need (where this cannot be provided by ECS workers or care finders)

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- Single Assessment System for aged care | Australian Government Department of Health, Disability and Ageing
- Aboriginal and Torres Strait Islander Assessment Organisations

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- Interactive map of available services
- Fact Sheet for assessors

2.4. Overview of assessment organisation roles and responsibilities

Contract and operational managers lead and manage the assessment organisation's outputs and performance according to their agreements with the Commonwealth. Assessment organisations cover geographical assessment regions across Australia.

The following table explains at a high level the different assessment organisational roles. The role type describes business roles which are of the delivery of the program through the agreement and system roles, conducted on the My Aged Care system.

The Department understands that, for Aboriginal and Torres Strait Islander organisations, where assessment services may be one of the many services that they provide to older Aboriginal and Torres Strait Islander people, the assessment workforce may be able to leverage expertise and skills within the broader organisation to inform the delivery of holistic aged care assessments under the clinical governance framework described in Appendix D.

For further information on the qualifications required to hold the roles in the below table, please refer to Appendix G. Refer to the My Aged Care Workforce Learning Strategy for the training requirements for the roles specified below.

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Table 11. Assessment organisational roles and responsibilities (excluding some roles in RAC)

Role Title	Role type	Role Description
Contract manager	Business	Contract Managers, manage and report the assessment services and performance specified in the organisation's agreement with the Commonwealth. Contact point for the department for contract management.
Assessment Organisation Operational Manager	Business and System	Assessment Organisation Operational Managers, manage the delivery of assessment services specified in the organisation's agreement with the Commonwealth at an operational level. Operational managers may also hold organisational or outlet administration roles in the My Aged Care assessor portal.

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Role Title	Role type	Role Description
		They can initiate and submit delegate applications for others in their organisation.
Organisational and/or outlet administrator	Business and System	Organisational and/or outlet administers coordinate the operations of assessment organisations and their outlets. The administrator at an organisation level can view and manage information for the entire organisation in the portal. They are also responsible for updating service information as required.
Team leader	Business and System	A team leader oversees assessment teams, including delegates and assessors, and manages assessment activities including but not limited to the management of referrals detailed in Chapter 4 of this Aged Care Assessment Manual. Team leaders provide ongoing support to assessment staff, including clinical support to assessors and delegates. Additionally, team leaders undertake regular reviews of quality management processes to support continuous improvement of assessment related services.
Triage delegate	Business and system	A triage delegate performs functions and powers of the System Governor delegated to their role as detailed in Chapter 5 and 7 of the Aged Care Assessment Manual, including but not limited to determining an individual's eligibility for an aged care needs assessment.
Clinical assessor	Business and System	A clinical aged care needs assessor undertakes home support and comprehensive

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Role Title	Role type	Role Description
		assessments in accordance with Chapter 5 of the Aged Care Assessment Manual. A clinical aged care needs assessor also holds the role of non-clinical assessment delegate.
Non clinical assessor	Business and System	A non-clinical needs assessor undertakes home support assessments in accordance with Chapter 5 of the Aged Care Assessment Manual. A non-clinical aged care needs assessor also holds the role of non-clinical assessment delegate.
Clinical Assessment Delegate	Business and System	A clinical assessment delegate performs functions and powers of the System Governor delegated to their role as detailed in Chapter 7-8 of the Aged Care Assessment Manual, including but not limited to approving an individual for funded aged care services.
Non clinical assessment delegate	Business	A non-clinical assessment delegate performs functions and powers of the System Governor delegated to their role as detailed in Chapter 7-8 of the Aged Care Assessment Manual, including but not limited to approving an individual for funded aged care services under the Commonwealth Home Support Program. Non-clinical assessors and Clinical assessors hold this role.

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Role Title	Role type	Role Description
Workplace trainer	Business	A workplace trainer provides and coordinates the mandatory training required to be undertaken by staff within of an assessment organisation in accordance with the Aged Care Workforce Learning Strategy and Chapter 2 of the Aged Care Assessment Manual.
Administration officer	Business	An Administration Officer provides support to the Team Leader and delegates, by performing the day-to-day work of phoning and booking appointments, assigning the booking to assessors, rescheduling and reassigning an assessment should any changes need to occur (assessor on unplanned leave, older person needs to change the appointment) and assigning SPRs. Administration officers may hold the team leader system role to manage and assign, un-assign and reassign referrals or transfer referrals for triage and assessment(s) and assign SPRs to an assessor.
Delegate support officer	Business and System	Delegate Support provide support to the assessment delegate with administrative tasks associated with delegation such as printing and sending letters.

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My Aged Care Assessor Portal - Organisational Administrator User Guide

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2.5. Supporting Community Engagement about the Aboriginal and Torres Strait Islander assessment pathway

Culturally safe assessments are everyone's responsibility.

As Aboriginal and Torres Strait Islander Assessment Organisations are embedded within communities, these organisations are well placed, as trusted intermediaries, to inform their communities about the availability of the Aboriginal and Torres Strait Islander Assessment pathway through various channels suitable to the community.

To support all assessment organisations communications products developed by the Department can be adapted to suit community. Products could include:

- A website with more information about Aboriginal and Torres Strait Islander assessment to refer to
- Scripts that can be turned into radio content, or videos using local leaders
- Social media tiles that can be shared on organisations platform
- Printed products that can be used to generate interest in the service

2.5.1. Supporting the broader roll out of Aboriginal and Torres Strait Islander Assessment Organisations

Aboriginal and Torres Strait Islander Assessment Organisations participating in the first phase of the implementation of the workforce will assist and inform the department's planning for future phases of the implementation.

These organisations and broader community engagement will provide advice,

, input and feedback regarding the cultural appropriateness of the aged care needs assessment process, including time dedicated to community engagement and case management for assisting older Aboriginal and Torres Strait Islander people in their aged care assessment journey.

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2.6. Training requirements for assessment teams

The My Aged Care Workforce Learning Strategy 2025 (Workforce Learning Strategy), and subsequent editions of this strategy defines and sets the mandatory minimum training requirement for the Single Assessment System workforce and the My Aged Care workforce, including timeframes for completion. Training occurs as part of the staff members induction into the assessment organisation. Some roles have mandatory credential requirements. Details of these credential requirements are provided in Attachment F. The assessment organisation is responsible for validating that each person has the required credentials for their role before requesting registration for training.

The department and assessment organisations are jointly responsible for training assessment organisation staff. The Workforce Learning Strategy explains the blended approach to mandatory training requirements including on-line training, on-the-job learning and learner appraisal. This approach reflects that the Single Assessment System

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workforce and My Aged Care workforce undertakes functions broader than just screening and assessment. This approach also acknowledges existing knowledge and skills of the workforce, and that learning is ongoing.

To complement the Workforce Learning Strategy, a My Aged Care Quality Learning Framework establishes processes by which the My Aged Care workforce can attain and maintain the capabilities they require, including the mechanisms by which capabilities are verified through on-line learning, on-the-job training, and learner appraisals. It defines the learning quality standards and guidelines that govern the implementation of the minimum training requirements through a blended model of learning and training.

2.6.1. Training delivery

Assessment organisations are responsible for ensuring their workforce undertake relevant minimum mandatory training requirements. Learners must complete the training that is relevant to their role, and all roles held (if multiple). Training is only available to people who are working in an assessment organisation that delivers that service. The department will consider exceptions for operational requirements. To find out more email myagedcare.capability@health.gov.au

The department delivers learning and supports training through a learning management system called MAClearning. The MAClearning platform supports delivery of minimum training requirements described in the Workforce Learning Strategy, supported by guides that outline the requirements for successful completion.

Access to MAClearning is provided by the department. Workplace trainers and operational managers are responsible for providing the details of new learners to the department for registration on MAClearning. Registration requests should be sent to maclearninghelp@Health.gov.au.

Delegates are also required to complete specified delegate training through the MAClearning system.

From time to time, the department may require assessors to undertake additional training when changes are made to programs, policies or processes. Generally, this training will be provided through MAClearning.

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- My Aged Care Workforce Learning Strategy 2025
- My Aged Care Quality Learning Framework
- New training and learning system for My Aged Care workforce

2.7. The single assessment pathway

On entry into My Aged Care, an assessment referral is made (following screening) to an assessment organisation for the older person. Once an assessment referral has been accepted by an assessment organisation, older people's care needs will be triaged by a clinically trained Triage Delegate who will make a decision on a person's eligibility for an aged care needs assessment and, if eligible, ensure that the assessment type they are referred to is proportionate to their needs and level of complexity.

Upon accepting an assessment referral, Aboriginal and Torres Strait Islander Assessment Organisations are expected to actively engage with the older person as well as their

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support networks. This may include but not limited to, Elder Care Support Staff, care finders, aged care providers, GPs, Aboriginal Community Controlled Health Organisations, social workers, and other relevant parties who may have facilitated the older person to access the aged care system, to understand the needs of the older Aboriginal and Torres Strait Islander person.

Establishing these connections will help build a more comprehensive understanding of the older person's needs. This also minimises the need for the client to repeat their story or answer common questions multiple times which helps to reduce stress, thereby improving the overall assessment experience.

It is recognised that building trust can take time, particularly for older Aboriginal and Torres Strait Islander people who may need to feel safe and comfortable before sharing personal or sensitive information with assessors. To support this, assessments may be conducted over multiple sittings if required to allow the process to proceed at a pace that respects the older person's readiness and preferences. During this period, assessors are expected to maintain regular contact with the older person to ensure continuity while the assessment remains active. This ongoing engagement helps foster trust and continuity and ensures that the older person feels supported throughout the process.

Older people with entry level needs are assigned for a home support assessment and those with more complex needs are assigned for a comprehensive assessment.

There may be occasions where, during a home support assessment, questions will be triggered in the IAT that will require clinical judgement. To reduce the need for an assessment to be reassigned to a clinical assessor, the non-clinical assessor will be required to seek the attendance of a clinical assessor to ask the clinical questions at the time of the assessment via video or phone, or at a later time via phone (see Chapter 5).

Assessment Organisations (including those that are Aboriginal and Torres Strait Islander) may deliver assessments through subcontracting arrangements subject to approval from the department.

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2.7.1. Home support assessments

Non-clinical assessors undertake home support assessments of an older person's care needs under the *Aged Care Act 2024*. Non-clinical assessors use the IAT to enable nationally consistent assessment services. Home support assessments are appropriate for older people who have entry level care needs.

A home support assessment builds on the information collected during registration, screening, and triage to determine an older person's eligibility to receive aged care services. Home support assessments are conducted face-to-face when safe to do so in the older person's usual home setting. This will assist with the environmental, physical, and social components of the assessment as the assessor could observe the client's level of independence, functioning, and existing support arrangements. After the assessment, the assessor will develop a Support Plan that summarises the assessment findings, individualised goals, and service recommendations. The Support Plan will be submitted for approval to a non-clinical assessment delegate, and a Notice of Decision will be generated and sent to the older person and any of their registered supporters who are entitled to receive this information.

During the assessment, questions may be prompted in the IAT that require clinical judgement. These questions (referred to as clinical questions) will need to be asked in

accordance with the assessment organisation's clinical governance framework and standard operating procedures.

At the end of the assessment, the assessor may determine that the older person has intensive and complex care needs and cannot be supported to live at home independently with small amounts of entry-level support. . In these circumstances the assessment must be converted to a comprehensive assessment in the IAT before Support at Home or Residential Aged Care can be added to the support plan (see Chapter 5). If this conversion is initiated by a non-clinical assessor, they will need to seek the supervision of a clinical assessor in accordance with their organisation's clinical governance framework and standard operating procedures. The Support Plan will be submitted for approval by a clinical assessment delegate, and a Notice of Decision will be generated and sent to the older person and any of their registered supporters who are entitled to receive this information.

2.7.2. Comprehensive assessments

A comprehensive assessment is an assessment of aged care needs for older people, undertaken by clinical assessors, who use the IAT to enable nationally consistent assessment services. Comprehensive assessments are appropriate for older people who have more complex needs and who may require a higher level of care.

A comprehensive assessment builds on the information collected during registration, screening and at triage, to determine an older person's eligibility to receive aged care services. A comprehensive assessment is usually conducted in a suitable face-to-face context when safe to do so, to determine an older person's eligibility for aged care services. Optimally, an aged care assessment is undertaken in an older person's home. In some circumstances a comprehensive assessment may be undertaken in a clinical setting, such as a hospital. A support person (e.g. family, friend, registered supporter, Elder Care Supporter, Care Finder etc.) may also be in attendance.

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After completion of the IAT the assessor develops a Support Plan that summarises the assessment findings, individualised goals, and recommendations. The Support Plan will be submitted for approval by a clinical Assessment Delegate, and a Notice of Decision will be generated and sent to the older person and any registered supporters who are entitled to receive this information.

Comprehensive assessments often require a longer time to complete due to the complexity of needs. Assessors and assessment organisations are expected to maintain regular contact with the client while the assessment remains active to maintain continuity and build rapport.

Assessors from Aboriginal and Torres Strait Islander Assessment Organisations are expected to maintain regular contact with the client while the assessment remains active to maintain continuity and build rapport. The Aboriginal and Torres Strait Islander Aged Care Framework highlights that aged care assessment should be delivered in a cultural safe manner while also empowering older people to engage with the aged care system and receive services that commensurate with their needs. This ongoing engagement helps foster trust, ensures the client feels supported throughout the process, and contributes to a more accurate and respectful assessment outcome.

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2.8. Other assessment activities

2.8.1. Support Plan Reviews (SPR)

Assessors conduct SPRs for older people who have previously had an assessment where their needs and circumstances have changed or when finalising a period of reablement and the Support Plan is updated. Where there is a significant change in an older person's circumstances a reassessment is undertaken (see Chapter 10 Support Plan Review and reassessments').

2.8.2. Wellness and reablement

The provision of wellness and reablement approaches are embedded in the aged care assessment. These approaches build on people's strengths and goals to promote greater independence and autonomy in daily living tasks. They avoid 'doing for' when a 'doing with' approach can assist individuals to undertake a task or activity themselves without needing on-going service delivery, or with a reduced need for services. Reablement involves supporting participants to maintain or regain skills, improving functional capacity, improving confidence and enhancing capability so an older person can resume everyday activities. All assessors should adopt wellness and reablement approaches during the assessment and consider whether a recommendation for time-limited reablement under the CHSP is appropriate. Time-limited reablement services tend to be delivered within a 12-week period with the aim to wrap up services when the older person has met their goal or specific outcome. This involves the older person and reablement providers working together to plan how they will address specific barriers to independence and achieve the client's goal.

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2.8.3. Linking support

An assessment includes the provision of linking support activities to vulnerable older people where areas of vulnerability pose barriers to receiving mainstream aged care supports or care. Issues leading to vulnerability could include experiencing homelessness, mental health concerns, drug and alcohol issues, elder and systems abuse, neglect, financial disadvantage, cognitive decline and/or living in a remote locality, and previous traumatic events. The provision of linking support will assist in linking the older person to one or more services they require to live with dignity, and independence.

Assessors may work with Elder Care Support staff to provide guidance to older Aboriginal and Torres Strait Islander people to assist them to engage with the aged care system.

2.8.4. Assessment delegation

The Secretary of the department as the System Governor plays a key role in the governance of the aged care system. Under the *Aged Care Act 2024* the System Governor is afforded a range of powers and functions. These powers and functions include but are not limited to determining an individual's eligibility for an aged care needs assessment and their need for Commonwealth subsidised aged care services. The System Governor will delegate some of their powers and functions to internal delegations (departmental staff) and to some roles within assessment organisations. There are three roles within assessment organisations, that are delegated certain functions or powers of the System Governor:

- Triage Delegates

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- Non-clinical Assessment Delegates
- Clinical Assessment Delegates

For further information about delegate roles, their functions and responsibilities refer to Chapter 7 of this manual

2.8.5. Multi-disciplinary approach

Assessors undertaking a comprehensive assessment may be required to participate in a multi-disciplinary approach, particularly for complex or difficult assessments. This may include activities within or outside of the team such as multi-disciplinary case conferencing, joint assessments with other health professionals where necessary or multi-disciplinary consultation.

Multidisciplinary approach to aged care assessment for older Aboriginal and Torres Strait Islander people should goes beyond a clinical assessment and should consider the client's social, emotional, and cultural wellbeing. It may involve collaboration with other professionals, social workers, community members, as part of the assessment. This is to ensure the assessment is holistic, culturally safe and responsive to the person's needs.

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2.9. Aims and key features of assessment

The Single Assessment System aims to deliver consistent, high-quality assessments. The aims and key features of a My Aged Care assessment are to:

- deliver timely, safe, and nationally consistent aged care assessments of a high quality guided by the Aged Care Assessment Quality Framework, facilitating access to Commonwealth government aged care services which best meet the current needs of the older person.
- conduct assessments in accordance with privacy obligations, and with the consent of the older person (or their appointed decision maker), optimally in a face-to-face setting when safe to do so.
- value and support an older person's identity, culture, and diversity.
- involve older people and their carers, support network and other service providers, such as Care Finders and Elder Care Support workers (where they are registered as an Agent supporting the client) as appropriate in assessment and care support planning processes.
- ensure assessments of older people are independent, holistic, and older person-focused, incorporating assessment of physical, medical, psychological, cultural, social, environmental and wellness dimensions which are separate from service provision.
- deliver tailored Support Plans incorporating an older person's choice, improving the health and wellbeing of older people, which are based on their goals and current care needs, embedding wellness and reablement approaches where appropriate (see Chapter 5).

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- ensure older people from diverse backgrounds have equitable access to assessment services.

- provide a choice for older Aboriginal and Torres Strait Islander people to access culturally safe, trauma aware and healing informed aged care assessments from Aboriginal and Torres Strait Islander assessment organisations.

- consider both formal and informal services to assist an older person to remain in the setting most appropriate to their needs (such as their own home) to prevent premature or inappropriate admission to residential care.

- build and maintain effective and respectful working relationships with all My Aged Care assessors, service providers and other support agencies.

- provide short-term case management/linking support and short-term care coordination to vulnerable older people to address barriers affecting their access to aged care services, including extending connections with services and organisations in local communities (including those not listed on My Aged Care); and

- use the My Aged Care assessor portal, including the IAT and its built-in validated assessment tools and associated guidance materials to record assessment information accurately, prevent duplication, and re-use (pre-populate) information to deliver assessments of a high quality and standard.

2.10. Assessment quality

Assessment organisations are required to undertake aged care needs assessments using the IAT in a manner that focusses on the older person and contributes to delivering timely, safe and nationally consistent high-quality assessments, guided by the Aged Care Assessment Quality Framework (the Framework).

The Framework describes essential organisational skills required to support assessors to reach and maintain a high-quality assessment experience for every older person. It also incorporates the three-tiers of quality management, focusing on assuring quality assessments including those in relation to younger people (existing aged care recipients needing a reassessment for other aged care services), older Aboriginal and Torres Strait Islander people and those from diverse backgrounds.

The Framework aligns with the consumer-focused principles of the Aged Care Quality Standards from the Aged Care Quality and Safety Commission (ACQSC).

These Aged Care Quality Standards identify a high-quality assessment as one that meets the following four quality goals:

1. **Personal** –the assessment process is conducted as a respectful conversation and is responsive to the person's individual situation, context, goals, and aspirations – it includes and respects the role of carers and family and ascertains the sustainability of this support. Further, the support plan accurately reflects the older person's personal and unique circumstances (i.e., physical, medical, psychological, cultural, social, and personal) and the older person's specific goals and aspirations reflective of their assessed care needs.
2. **Effective** – the older person feels that the assessment process culminates in them being able to exercise choice and control in accessing the right services (as available

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and as eligible) to assist them to remain in a setting most appropriate to their needs. There is a reduced need for the older person to tell their story more than once.

3. **Connected** – the older person feels connected to their My Aged Care pathway to services; understands how and why the assessment process contributes to their journey and what the likely timeframes are for approval decisions and access to services.
4. **Safe** – the older person is provided a physically, emotionally and culturally safe assessment where their unique experiences are respected and factored into the way they are assessed for aged care. All assessments are delivered in a safe environment and free from harm.

The Framework provides detail of the key components and elements that must be in place to achieve high-quality assessment for every older person.

Detailed measures and performance targets against the four quality goals are described in Section 5 of the Framework. The tools used to manage a quality assessment align to a three-tiered approach to managing quality.

Assessment organisations are required to comply with the guidance set out in the Framework and this Manual. Assessment organisation managers play an important role in providing program support, training and information to their assessment staff to enable them to undertake quality assessments. Operational managers are required to distribute documents and products relating the Aged Care Assessment Quality Framework to their assessment workforce.

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2.11. Integrated Assessment Tool (IAT)

The IAT was developed in response to aged care reforms. These reforms form of the Australian Government's response to recommendations from the Royal Commission into Aged Care Quality and Safety.

The IAT and its Validated Assessment Tools is the prescribed tool that assessors must use under s62-5 of the Aged Care Act 2024. The IAT is essential for capturing a comprehensive profile of an older person's needs, ensuring accuracy and consistency in decision-making. The IAT consolidates key information about an older person's needs across a number of domains, providing a holistic view of their health and circumstances. Additionally, embedded validated tools assess abilities and capacity, forming a solid evidence base for determining care needs.

The IAT is divided into 12 sections. Some of the sections contain nested questions to tailor assessments, only diving deeper into areas where needed.

The IAT Offline Form is also available for assessors who are undertaking assessments remotely or who do not have any available internet access at the time of the assessment.

IAT Offline Form

IAT User Guide

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2.11.1. Validated Assessment Tools

Where appropriate, assessors should consider using culturally appropriate validated tools within the IAT to deliver culturally safe, trauma aware and healing informed assessments. These tools are detailed in Table 11

Table 12. Validated culturally appropriate assessment tools

Validated culturally appropriate tool	Short description
Good Spirit Good Life (GSGL):	The GSGL addresses gaps in health and aged care by providing a culturally-informed approach to measuring, understanding and meeting the quality of life of older First Nations people. The tool measures wellbeing using 12 interconnected factors which are important to the First Nations people, such as family and friends, connection to Country, community, culture, health, respect, their role as an Elder, support services, safety and security, spirituality, future wishes and basic needs being met. Guidance on Good Spirit Good Life is available at: https://www.aboriginalageingwellresearch.com/gsgl-resources (registration required to view) This tool is available in the Integrated Assessment Tool (IAT).
KICA Cog	The only validated dementia Assessment tool for older Indigenous Australians. It is recommended for use with rural and remote Indigenous Australians aged 45 years and above for whom other dementia assessments are not suitable. Please refer to the below guidance material for information on completing this validated tool and appropriately asking questions. • Please review the MAClearning element **Validated Assessment Tools in Practice** for further guidance on how and when to

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Validated culturally appropriate tool	Short description
	administer this validated tool with a client at an assessment. • KICA COG • Instruction Booklet This tool is available in the Integrated Assessment Tool (IAT).
KICA Cog Urban Regional	KICA was modified for use with Aboriginal people in regional and urban settings. The regional and urban KICA is an instrument to assess dementia in older Aboriginal people in regional and urban settings. **Additional information and training resources:** Please refer to the below guidance material for information on completing this validated tool and appropriately asking questions. • Please review the MAClearning element **Validated Assessment Tools in Practice** for further guidance on how and when to administer this validated tool with a client at an assessment. • Guidance on the KIKA Cog Urban Regional is available at Indigenous Cognitive Assessment: Regional and Urban KICA | National Ageing Research Institute Limited (nari.net.au) This tool is available in the Integrated Assessment Tool (IAT).
KICA Carer	The KICA-Carer is an informant questionnaire given by the interviewer. It is the informant cognitive subsection of the KICA that was developed and validated in the Kimberley region of WA. • Kimberley Indigenous Cognitive Assessment – KICA-Carer

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Validated culturally appropriate tool	Short description
	This tool is available in the Integrated Assessment Tool (IAT).
KICA COG Torres	Not currently included in the IAT. This validated tool has been adapted to be culturally relevant to Torres Strait Islander people in Far North QLD

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3. Chapter 3: Referral, registration and screening

What you'll find in this chapter

This chapter details the referral, registration and screening stages of the assessment journey. Information includes:

- Entry into My Aged Care
- Registered supporters
- Screening
- Alternative entry
- Emergency Residential Care – Application for Care form (for residential care or residential respite)

3.1. Entry into My Aged Care

My Aged Care is the entry point to access Australian Government-funded aged care services. My Aged Care consists of three access channels: telephone (the My Aged Care Contact Centre), digital (website and GP e-referral) and face-to-face with Aged Care Specialist Officers (ACSO) (through selected Services Australia service centres).

An older person's need for aged care services may also be identified by their family and carers, social worker, Elder Care Support connectors, care finders, or service providers.

Where an older Aboriginal and Torres Strait Islander person or their advocate approaches an Aboriginal and Torres Strait Islander assessment organisation , it may be most culturally appropriate for the assessment organisation to self-refer the client for an aged care assessment. The assessor can then assist the client with the registration and triage process to determine eligibility for an assessment. This support could be provided in person to ensure a culturally safe experience. Self-referral can also be used in other settings, described at section 4.4 in Chapter 4.

These entry points to access Australian Government-funded aged care services comprise the 'approved form' under section 56 of the Aged Care Act 2024 for new applicants and section 64 for those older people or eligible younger people who are making an application for a reassessment (noting the 'request a Support Plan Review' pathway also constitutes an approved form for section 64). These entry points also comprise the approved form for the purposes of section 71 (alternative entry).

Note:

Older Aboriginal and Torres Strait Islander people will be able to indicate their preference for their assessment to be conducted by an Aboriginal and Torres Strait Islander organisation at any of the below stages, or referral points.

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3.1.1. Modes of entry into My Aged Care

Phone

Older people can call the My Aged Care Contact Centre on 1800 200 422, 8am to 8pm Monday to Friday or 10am-2pm Saturday, local time (FreeCall*).

The My Aged Care Contact Centre receives inbound calls and referrals, creates records for older people, progresses the registration and cancellation of supporter and agent relationships, raises SPR requests, screens for needs and refers older people to assessment organisations and service providers and/or provides information to older people.

Online

Apply for an assessment online

The Apply for an Assessment Online process can be used as an alternative to contacting the My Aged Care Contact Centre or seeing an ACSO. The online form enables consumers to register with My Aged Care and apply for their first assessment online or on behalf of a family member or friend. The My Aged Care system automatically processes the online form. A request to register a supporter for the older person can also be submitted using this tool.

Note: some older people may have had a previous assessment but were found ineligible, which would also result in them having an existing record.

Where the form successfully processes, a referral for assessment will be automatically issued to an appropriate assessment organisation. In instances where older people have an existing older person record, or are missing key identifying information, or there is an error in the automated processing, they will be directed to call the My Aged Care Contact Centre. For existing older people, the My Aged Care Contact Centre will issue a SPR request to the assessment organisation.

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Web referrals (Make a Referral form)

For an older person's first contact with My Aged Care, GPs and health professionals can make a referral directly to an assessment organisation using the 'Make a Referral' form through the My Aged Care website.

Web referrals contain decision support to guide the home support or comprehensive assessment pathway, however, the triage delegate can accept the recommended assessment pathway or recommend (with justification) the other assessment option.

Where the referral is submitted by a GP or health professional, for the first assessment referral (e.g., where no previous assessment exists), the system will automatically process the referral where all information is correctly entered and attachments supplied. Where automated processing is successful, a referral for assessment will be automatically issued to an appropriate assessment organisation.

If the GP or health professional recommends a comprehensive assessment and the older person has previously been assessed for a home support assessment, the web referral will be intercepted by the My Aged Care Contact Centre and follow the SPR pathway rules to the assessment organisation that undertook the most recent assessment,

regardless of the recommendation (unless the request qualifies for a direct comprehensive assessment referral, such as for TCP).

GP e-Referral

GPs may also choose to use GP e-Referrals which can be accessed from their practice management system. The form will pre-populate the patient's information with the GP then adding any additional information and attachments as required. It is then submitted safely and securely to My Aged Care for processing and will follow a similar process to that outlined for the Make a Referral form.

GPs will be able to record a client's preference for an Aboriginal and Torres Strait Islander assessment organisation.

Face to face access through an Aged Care Specialist Officer (ACSO)

People seeking access to aged care can alternatively book a face-to-face appointment with an ACSO who are located in some Services Australia service centres. Bookings for the free service can be made by calling 1800 227 475 on weekdays from 8am to 5pm.

ACSOs will be able to help older Aboriginal and Torres Strait Islander people indicate their preference for an Aboriginal and Torres Strait Islander assessment organisation.

All Service Australia service centres can provide general information about aged care services. They can help connect people to My Aged Care's online or phone service and/or connect the older person to more intensive support if required.

Services Australia website: Aged Care Specialist Officer

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3.1.2. My Aged Care Online Account

Create account and registration

Once registered with My Aged Care, an older person can set up access to their My Aged Care Online Account by linking it to their myGov account. Confirmation of the type of account, identification and contact details are required. Registered supporters for an older person can also set up their own Online Account. If they have authority to access the older person's information, they can navigate from their own account to the account of the person they support.

An older person's Online Account contains important information about the older person, their registered supporter(s), organisation agent relationship details, aged care assessments, services, and interactions with My Aged Care. Further information about accessing and using a My Aged Care Online Account is available on the My Aged Care website.

3.2. Support networks for an older person

Where an older person is registered with My Aged Care, there may also be a network of registered supporters and/or agent organisations on the older person's record.

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3.2.1. Registered supporters

Supported decision-making in aged care legislation

The *Aged Care Act 2024* (the Act) puts the rights of older people first. It aims to ensure aged care services are safe and older people are treated with respect.

Everyone has the right to make decisions about their life, including the support and services they receive from aged care. A key change under the Act is that every older person is presumed to have the ability to make decisions. Some older people may want or need support to make these decisions. Supported decision-making is the process of providing support to help older people make and communicate their own decisions, rather than having decisions made for them. This allows older people to remain in control of their lives.

Role of registered supporters

Chapter 1, Part 4 of the Act establishes the role of a registered supporter. The registered supporter role is one of the changes under the Act that aim to promote older peoples' rights to be supported to make their own decisions. This role starts on 1 November 2025. The registered supporter role replaces existing regular and authorised representative relationships in My Aged Care.

When the Act starts, older people can still choose who can support them to make decisions, if they want or need support. These people can be registered supporters. A registered supporter can be a trusted family member or friend or anyone else of an older person's choosing, who can help them to request, access and understand information and communicate their wishes.

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Registered supporters can:

- help older people to make and communicate their own decisions about aged care. This might include speaking to My Aged Care, aged care assessors, aged care providers and workers, and the Aged Care Quality and Safety Commission, and
- request, access and receive information about the older person they support.

Having a registered supporter does not stop an older person from being able to receive information, make decisions, or communicate directly with others including their aged care provider, My Aged Care and assessors. Older people can continue to request, receive and communicate information and make decisions.

All registered supporters have duties under the Act they must comply with. These duties are intended to promote an older person's safety, rights, will, and preferences.

Wherever possible, aged care providers and Assessment Organisations must continue to ask the older person to make decisions about their aged care services and needs, even where there is a registered supporter. An older person's ability to make decisions and communicate their will and preferences may change from day to day, or over time, so understanding who their registered supporters are and the role they can perform is essential in respecting the older person's rights.

The System Governor plays a role in regulating registered supporters. This includes registration, suspension and cancellation.

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Active, appointed decision makers

Some registered supporters also have guardianship, enduring power of attorney or similar legal authority recognised under the Act. These people are appointed decision makers for the older person and can make decisions on behalf of the older person under Commonwealth, state or territory arrangements. They can only make decisions in line with their active, legal authority.

Becoming a registered supporter does **not** provide a person with decision-making authority for the older person. A registered supporter's role is to support the older person to make and communicate their own decisions.

There is no requirement to register a supporter, including where that person is also an appointed decision-maker under a Commonwealth, state or territory arrangement. An active, appointed decision-maker can continue to exercise their legal authority, without being registered as a supporter.

Consent and registered supporter types

In most cases, both the older person and their prospective supporter must consent to the relationship being registered. As part of obtaining consent, the older person will be asked: (1) if they would like to register a supporter; and (2) if they would like that supporter to be automatically given certain information and documents about them. This is information that may or must be provided to the older person under the Act. An older person should not feel pressured to register a supporter relationship.

Active, appointed decision makers can seek to register as an older person's supporter without the consent of the older person.

This means there are three types under the umbrella term of 'registered supporter':

- Supporter – a person who the older person consented to registering as a supporter **and** to be automatically given information and documents that may or must be given to the older person under the Act.
- Supporter lite – a person who the older person consented to registering as a supporter but **not** to be automatically given information and documents that may or must be given to the older person under the Act.
- Supporter guardian – a person who is registered by the System Governor as a supporter and who also has active decision-making authority for the older person by virtue of a Commonwealth, state or territory arrangement.

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The following table summarises these types and the consent requirements:

Table 13. Supporter relationships and consent requirements

	Two party consent		One party consent
	Supporter	**Supporter lite**	**Supporter guardian**
Can help an older person make and communicate their own aged care decisions	✓	✓	✓
Must comply with the duties of a registered supporter, including to avoid or manage conflicts of interest	✓	✓	✓
Will be given certain aged care information about the older person automatically	✓	✗	✓
Can request aged care information about the older person	✓	✓	✓
Can make decisions on behalf of the older person, in line with their active, authority under Commonwealth, state or territory arrangements	✗	✗	✓

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The labels ‘supporter’, ‘supporter lite’ and ‘supporter guardian’ may be referred to in the My Aged Care Assessor Portal and App during the supporter registration process. For example, if an older person indicates they consent to registering a supporter, but not to that supporter automatically being given certain information about them, the My Aged Care Assessor Portal or App will note that a supporter lite relationship is being progressed. These labels will also be visible in the My Aged Care Assessor Portal or App to indicate the type of relationship that was registered.

An active, appointed decision-maker may choose not to register as a supporter, but to otherwise make themselves known to My Aged Care. Requests to do so should be escalated to the departmental delegate responsible for supporters, with proof that demonstrates the appointed decision maker has decision-making authority for the older person under a Commonwealth, state or territory arrangement and that their authority is active.

Suspension and cancellation of a registered supporter

Suspension and cancellation are new relationship statuses for registered supporters. While suspended, a supporter’s registration has no effect. This means that an assessor cannot engage with that person as a registered supporter. Cancellation can follow suspension or can occur without a prior suspension, depending on the circumstances. If

cancelled, a supporter's registration has no effect, and an assessor cannot engage with that person as a registered supporter.

The processes of suspension and cancellation are detailed in the Act and intend to promote the safety and wishes of an older person. More information on these processes can be found on the department's website from 1 November.

Assessors have a role in raising or handling complaints, concerns, or requests to cancel the registration of a supporter by escalating any relevant information to the departmental delegate responsible for supporters.

No requirement to register a supporter

Not every older person will want or need a registered supporter. Carers and other significant people in an older person's life continue to play an important role in supporting an older person, without needing to be registered supporters.

Transitioning to the registered supporter role

Most representative relationships in My Aged Care will go through changes to come under the Act. If an older person has a regular or authorised representative active in My Aged Care on 31 October 2025, they will become and be known as a registered supporter under the Act on 1 November 2025. This ensures that older people seeking or receiving aged care services will continue to have decision-making support available to them.

From 1 November 2025, representative relationships that are active in My Aged Care and have not opted out will transition to supporter relationships. If older people and their supporters did not want to transition to a supporter relationship and did not opt out by 31 October, they can still request to end their supporter relationship at any time in their My Aged Care Online Account or by calling My Aged Care.

Representative arrangements made under the Quality of Care Principles 2014 will no longer exist once the Act comes into effect. Further, these arrangements will not automatically transition to the Act. These representatives are encouraged to become registered supporters under the Act.

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Supported decision-making in assessments

From 1 November, assessors should promote an older person's right to make decisions, engage with registered supporters in line with the older person's will and preferences, and embed supported decision-making in assessment delivery.

It is important to remember that supported decision-making principles and practices are not just about engaging with registered supporters. Supported decision-making is about supporting an older person to make their own decisions, in the ways they want or need.

This might look like:

- Asking the older person to make decisions about their aged care services and needs (rather than deferring to their family, registered supporters or their active, appointed decision-maker),
- Checking whether an older person has a registered supporter, and whether the older person wants that person to provide support. Remember that having a registered supporter does not mean that the older person needs to include them in discussions and their decision-making processes. It is always up to the older

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person. A registered supporter can only act in line with the older person's will and preferences, and

- Considering how supported decision-making principles can be embedded into an assessment process. This could be:
  - more time for the older person to explore options and only asking them to make one decision at a time,
  - presenting the older person with options in ways the older person prefers, such as visually, and
  - encouraging and supporting the older person to make decisions at a time and place most comfortable for the older person.

- Key information and pathways to request to register a supporter: www.myagedcare.gov.au/registering-supporter
- Information on appointed decision makers: www.myagedcare.gov.au/registering-supporter/appointed-decision-makers
- Registered supporter resource library, including policies: https://www.health.gov.au/resources/collections/registered-supporter-resources
- Guide to using the Assessor Portal
- My Aged Care – Assessor Portal User Guide 2 – Registering support people and adding relationships
- Provide access to language support service such as accessing an interpreter or translated documents: https://www.health.gov.au/topics/aged-care/translating-and-interpreting-services-for-aged-care
- Information about transitional arrangements in place for My Aged Care representatives before 1 November 2025:
  - Transition arrangements for the new registered supporter role | Australian Government Department of Health, Disability and Ageing
  - My Aged Care website: Upcoming changes to support roles and relationships | My Aged Care

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3.2.2. Agent organisations

An older person will no longer be able to create their own agent organisation relationships on the My Aged Care website or in their online account. These relationships will need to be created by the agent organisations' staff or My Aged Care staff, including assessors, through the Service and Support Portal.

Upcoming changes to support roles and relationships | My Aged Care

My Aged Care Service and Support Portal | Australian Government Department of Health, Disability and Ageing

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3.3. Screening

My Aged Care Contact Centre staff and ACSOs complete screening after a person registers with My Aged Care and has a My Aged Care older person record and identification number assigned. Older people can opt in to receive SMS notifications prior to the call, which helps build trust by alerting them that My Aged Care will be calling from a private number.

Alternatively, screening is built into the online inbound referral, such as when a health professional conducts a web-referral and applies for an older person's assessment online.

Under the *Aged Care Act 2024* screening **will no longer decide** if a client is eligible for an aged care needs assessment. Instead, this responsibility now rests with Triage Delegates within assessment organisations.

The screening outcome is intended only as a recommendation on an individual's **likely eligibility** for an aged care needs assessment.

Under the *Aged Care Act 2024*, individuals maintain the right to make an application for funded aged care services even if they are not initially considered to meet the eligibility criteria for an aged care needs assessment. However, the final eligibility determination rests with the Triage Delegate in an assessment organisation, who evaluates the referral according to the requirements outlined in section 58 of the *Aged Care Act 2024*. See section 1.4 for eligibility requirements to access funded aged care.

An individual's eligibility to access services once they have been assessed will be determined by an Assessment Delegate. The Assessment Delegate will consider the 'assessment report', which comprises the support plan and any other relevant information. If an Assessment Delegate is satisfied an individual requires access, they will make a decision under section 65 to approve access to one or more funded aged care services.

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3.3.1. Outcomes of screening

On completion of the screening:

- Assign referral priority to indicate the timing of the assessment and the urgency in which services are delivered to an older person, which is based on an older person's level of function, the level of risk in relation to the care situation and any other relevant concerns.
- Send the referral to an appropriate assessment organisation with the older person's consent.
- For urgent referrals for the End-of-Life Pathway, ensure the referral is marked as 'End-of-Life'.
- Send urgent service referrals to a CHSP provider with the older person's consent and send an assessment referral.

Note:

Where a referral is issued to the organisation in error, the My Aged Care Contact Centre can recall the referral (see Chapter 4 Referral for assessment).

3.4. Alternative entry

Section 71 of the Act provides 'alternative entry' pathways that allow an older person in certain circumstances to begin receiving care before being assessed and approved for funded aged care services.

Subsection 71(4) of the Act outlines the three different circumstances when an individual may access care before undergoing an assessment or receiving approval. These circumstances are outlined as the following:

- **Urgent services**: The individual was in urgent need of access to funded aged care services and there was a significant risk of harm to the individual if services were not provided before an approval was given;
- **Lack of availability of culturally safe assessments**: The individual is an Aboriginal and Torres Strait Islander person and at the time the individual sought access to funded aged care services, there was a lack of availability to access a culturally safe assessment
- **Services commenced through a specialist aged care program and there is a significant delay in assessment**: The individual started to receive care from a specialist aged care program (such as CHSP, MPSP or NATSIFACP) before approval was given and at the time the individual sought funded aged care services there was a significant delay in the availability to undertake a needs assessment.

This pathway is available for individuals who commenced accessing specialist aged care services before an approval was given. Specialist aged care programs include:

- Multi-Purpose Service Program (MPSP)
- National Aboriginal and Torres Strait Islander Flexible Aged Care Program (NATSIFACP); and
- Commonwealth Home Support Program (CHSP).

Note that, because eligibility criteria for the Transition Care Program (TCP) requires the individual to have an assessment in a hospital setting before they are recommended TCP, TCP cannot be accessed through alternative entry.

To access any of the alternative entry pathways, an individual (often with the support of their provider) must make an application to the System Governor in an 'approved form' within the time period specified in the Aged Care Act 2024 (the Act) and *Aged Care Rules 2025*.

An application can be lodged for access to Commonwealth subsidised services under the Act's alternative entry provisions via any of the available application pathways (e.g. Contact Centre, online referral or self-referral through an Assessment Organisation). In this context, an 'application' under section 71 refers to the initial registration process undertaken by contacting My Aged Care Contact Centre.

This pathway is also available for individuals to access residential care or residential respite care under the Act's alternative entry provisions via any of the available application pathways or by submitting the Emergency Residential Care - Application for Care Form. For further information on the form see section 3.6, Chapter 3).

Individuals (often with the support of their provider) have a period of **5 days** after the day on which services commenced to make an application under section 71 of the Act

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In most cases, individuals who have accessed a service prior to an assessment would have accessed this service through contacting the My Aged Care Contact Centre and referred at the point of screening. In a small minority of cases, individuals may receive urgent services directly through a CHSP provider prior to applying through My Aged Care, in which case the provider would support the older person to register through My Aged Care within the 5-day timeframe.

The *Aged Care Rules 2025* specify one exception, if the registered provider delivering services is a NATSIFACP or MPSP provider. In this instance, the individual has **30 days** after the day care commenced to make an application. Providers should support the individual to go through the application process within this timeframe.

If the System Governor is satisfied one of the circumstances outlined in the Act applies to the individual and any other requirements under section 71 have been met, the Act allows for the date care began to be recorded as the date of effect of approval. Further information is available in Chapter 9 of the Manual to assist Assessment Delegates to give backdated approval after care has commenced via the Notice of Decision.

Alternative Entry is also applicable for older people new to the aged care system or those individuals *already* eligible and accessing services but whose needs have changed and a re-assessment of their needs is required.

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3.4.1. Alternative Entry – CHSP Direct-to-Provider Referrals

If an individual is eligible for the alternative entry pathway under subsection 71(4) of the Act, they can be issued a CHSP direct-to-provider referral prior to being assessed.

These referrals are issued by triage delegates and, in some circumstances, My Aged Care Contact Centre staff or ACSOs during screening.

Older people who may require CHSP referrals prior to being assessed include:

- New individuals who are applying for an aged care needs assessment
- Current CHSP clients who are waiting for a support plan review or reassessment
- Support at Home participants who have a fully allocated budget or are waiting for a budget allocation and have an urgent need for services.

Screening

The My Aged Care Contact Centre and ACSOs can only issue CHSP urgent service referrals in limited circumstances if there is an immediate health or safety need.

These services are:

- nursing
- transport
- meals
- personal care
- grocery shopping
- respite.

When issuing an urgent referral, the My Aged Care Contact Centre or ACSO will place a high priority on the referral to an assessment organisation. For an existing client who has

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previously been assessed, the contact centre or ACSO will issue a SPR request (unless the older person meets the requirements for a direct comprehensive assessment referral).

Triage

Triage delegates are responsible for determining whether individuals require direct-to-provider referrals through the CHSP prior to being assessed.

Triage delegates should:

- Issue direct-to-provider referrals for CHSP services if the client requires the service and meets the criteria in subsection 71(4) of the Act
- Review any urgent service referrals that have been issued by the My Aged Care Contact Centre or ACSO and extend 'recommended end dates' if required
- Check all clients with an immediate health or safety need for services have a 'high' assessment priority.

Assessment

Even if the services are no longer required, individuals who have accessed CHSP urgent services must undergo an assessment.

Assessors must contact an older person within two weeks if they have been issued urgent service referrals to ensure:

- Appropriate services are in place, and the urgent need is being addressed
- The assessor provides a more thorough analysis of the needs
- Services can be confirmed or adjusted as required.

See information on Exceptional Circumstances below for clients who accessed CHSP services through the Alternative Entry pathway but do not undergo an assessment.

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3.4.2. Residential care or residential respite care in urgent circumstances

Alternative entry pathways are available for individuals who require urgent residential care or residential respite care. To be eligible, at the time care is accessed there must be a significant risk of harm to the individual if those services were not delivered before approval to access funded aged care services was given. An application can be lodged by providers or individuals for access to residential care or residential respite care under the Act's alternative entry provisions via any of the available application pathways or by submitting the Emergency Residential Care - Application for Care Form. Individuals have 5 days after the day on which services commenced to lodge an application. For further information on the use of the form to apply urgent residential care or residential respite care, refer to section 3.6 of this Manual.

In urgent cases, the person is already receiving care, but this does not mean they are permanently entering aged care or will remain at the current facility.

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3.5. Exceptional Circumstances – approving a service without an assessment

In some circumstances, a client may be eligible for an assessment but is unable to have one owing to exceptional circumstances. This typically occurs for a cohort that access funded aged care services through the alternative entry pathway but pass away prior to receiving an assessment.

If the client used a time-limited urgent service through the alternative entry pathway, but is refusing to have an assessment, the Triage delegate or assessor will need to explain that it is a requirement under the Aged Care Act 2024 (the Act) to complete an assessment in order to keep receiving services, otherwise their government-funded services will cease. Alternatively, the client may enter a full fee-paying arrangement with the service provider. The assessor should also remind the client of the benefits of undergoing a full assessment, for example:

- It does not cost anything to receive an assessment
- An assessment will provide the client with a more fulsome evaluation of their needs and may result in different services being recommended that they were not previously eligible for

If the assessment does not continue, but the Exceptional Circumstances clause applies, services already on the participant's support plan should remain listed when the triage delegate or assessor finalises the Notice of Decision and Support Plan.

Where the client passes away, the assessor should select the 'Notify My Aged Care of a Death' functionality on the assessor portal to complete the assessment.

Note:

For any other circumstance under the Exceptional Circumstances clause, an off-system process is to be undertaken. Assessment organisations are to contact the department in the first instance at MyAgedCare.Assessment@health.gov.au for assistance.

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If assessment is cancelled or exceptional circumstances do not apply

If an assessment is cancelled and the assessor considers exceptional circumstances do not apply, or if the triage delegate makes an ineligibility decision for the client, the services should cease. There is a process which the department can recover funding from the provider.

3.6. Emergency Residential Care - Application for Care

Older people seeking access to funded aged care services will not be required to complete an 'Application for Care Form', which is a change from the process that occurred before 1 November 2025. The act of applying for access to services will occur through one of the existing registration pathways (e.g. the Contact Centre, Support Plan Review request for existing clients, etc.).

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However, older people seeking access to emergency residential care (ongoing or short term – i.e. respite) may use the 'Emergency Residential Care - Application for Care Form', instead of one of the registration pathways.

Residential care (ongoing or short-term)

To be considered for a Commonwealth subsidy in urgent circumstances for residential care or residential respite, the registered provider can complete and submit a valid Emergency Residential Care - Application for Care Form. This is one of the 'approved forms' under section 71 of the Act to access funded aged care services before an aged care needs assessment.

In completing the form**:**

- The form must have both the Application for approval section and the Emergency case section of the form completed; and
- The provider may submit the form, including supporting information for referral to their local assessment organisation, within 5 calendar days after the day care commenced unless an extension has been granted by the System Governor (on application).

If an older person and/or their active appointed decision maker authorised under s 28(2) of the Act is unavailable, the registered provider may sign the form. If a provider prefers the older person's appointed decision maker to sign the form, they may apply for an extension. Under section 71 of the Act, an extension must be requested if the application cannot be submitted within the required timeframe.

In urgent cases, the person is already receiving care, but this does not mean they are permanently entering aged care or will remain at the current facility.

Triage delegates must review the *Emergency Residential Care - Application for Care Form* for completeness and be satisfied that the requirements under s58 are met. The Assessment Delegate is responsible for reviewing and approving the application form.

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3.6.1. Intake and assessment process

When the *Emergency Residential Care - Application for Care Form* is received, the assessment organisation must:

- Ensure the form signed by the older person, or their active, appointed decision maker, and confirm the *emergency case* section is completed correctly by the registered provider.

- Confirm the date the form was received. If it was submitted after 5 calendar days from the care start date, assessment can only proceed if the provider has been granted an extension by the department as System Governor, following an application for extension. Requests for extensions can be sought by emailing **MyAgedCare.Assessment@health.gov.au**.

- Register and self-refer the older person in the My Aged Care assessor portal (if required and self-referral criteria are met).

- Assign assessment priority. Although the older person is already in care, the Triage Delegate must consider the urgency of their circumstances. If the older

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person's condition is rapidly deteriorating, the assessment should be scheduled as soon as possible.

- Upload the verified form to the older person's record.
- Schedule a comprehensive assessment with an assessor. Where possible, this should be face-to-face and collect information to:
    - Determine the older person's required level of care; and
    - Confirm that urgent circumstances existed at entry and that prior approval was not practicable.
    - Note: for respite care assessments, the DEMMI modified tool must be undertaken face to face by clinical assessors only.

The assessor must collect as much information as possible about the urgent situation from the older person, their registered supporters (if available, and in line with the older person's will and preferences), their active, appointed decision maker/s (as relevant), the registered provider, and any other professionals involved at the time of entry.

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4. Chapter 4: Referral for assessment

What you'll find in this chapter

This chapter details how to manage referrals for assessments in the My Aged Care assessor portal.

The following topics are covered in this chapter:

- managing and actioning referrals and assigning referral priority;
- managing preference for Aboriginal and Torres Strait Islander assessments;
- End-of-Life Pathway 'high priority' flag in the system;
- how priority categories are assigned to different assessments including Home Support, Comprehensive (including those completed in a Hospital setting); and
- how assessors can self-refer for eligible and (likely) ineligible individuals.

4.1. Managing referrals

Through the My Aged Care assessor portal, a team leader can review, assign, un-assign, and re-assign referrals and SPR requests to assessors in their team. The team leader can be supported by administration officers to support day-to-day referral activities. Before accepting the referral, team leaders can change the priority of assessment referrals. Referrals can be transferred under certain conditions. Team leaders and assessors can notify My Aged Care of a deceased older person. The portal also allows assessors (and team leaders who have the assessor role type) to manage self-referrals.

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4.2. Referral priority categories

A referral for assessment will include a priority rating that relates to the timing of the assessment and the urgency in which services are delivered to an older person. The allocation of a priority category for a referral is based on an older person's level of function, the level of risk in relation to the care situation and any other relevant concerns.

While accepting the referral, the team leader can change a priority allocation set by the My Aged Care Contact Centre or ACSO if their professional view is that it does not align with the guidance on priority for home support and comprehensive assessments (hospital and community setting) in the section below. Timeframes associated with priority categories are specified in assessment organisation contractual agreements with the department. A priority category is also assigned when an older person is referred to services. Note: the timeframe is calculated from the date the referral was issued, not the date the priority was changed.

In the assessor portal, there are visual indicators for referrals and assessments to facilitate timely responses of priority timeframes.

Assessment referrals to assessment organisations must be actioned (accepted, rejected or transferred) within three calendar days from issue. Following acceptance of the referral, other timeframes are applied for managing referrals, as highlighted in Tables 14-16 below.

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4.2.1. Home support assessment priority categories

Based on the older person's needs, a referral for a home support assessment may be classified as one of three priority categories, high medium or low.

Table 14. Home support assessment priority categories

Priority Level	Definition	**Timeframes (from day of referral acceptance to completion)**
High	Requires an urgent assessment based on the information collected during the referral process indicating the person would need to be hospitalised or leave their current residence without support because they are unable to care for themselves, or their carer is unavailable and/or has serious risks or safety hazards in their home. This may be due to a crisis in the home involving either the older person or the carer, or a sudden change in the older person or carer's medical, physical, cognitive, or psychological status. High priority referrals may also be accompanied by a direct-to-provider referral for urgent CHSP services (see Chapter 3 for more information on the Alternative Entry Pathway).	10 calendar days
Medium	Information available at referral indicates that the older person is not at immediate risk of harm, however there is a progressive deterioration in the older person's current status (physical, mental, cognitive, situational, functional), and/or the level of care that is currently available does not meet the older person's needs and is not sustainable long term.	14 calendar days
Low	Refers to cases where the referral information indicates that the older person has sufficient support at present and does not need immediate assistance but requires an assessment in anticipation of their upcoming care requirements. Examples include the carer planning a holiday which will result in the care recipient requiring the provision of substitute care, or recognition that the person is having increased difficulty living independently and options for care need to be discussed with the older person and their carer or family. Low priority cases would also indicate that an older person can manage with their current living arrangements, can complete most functional tasks without help, and/or there are no immediate aged care related health and safety risks apparent.	21 calendar days

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4.2.2. Comprehensive assessment priority categories- community setting

The community setting includes the older person or carer's home, a community centre, private residence, a clinic, a residential aged care facility, or where the setting is not specified.

Table 15. Comprehensive assessment priority categories – community setting

Priority Level	Definition	**Timeframes (from day of referral acceptance to completion)**
High	Requires an immediate response (e.g., response within 48 hours) based on the information collected during the referral process. An urgent assessment is required if the person's safety is at risk (e.g., high risk of falls or abuse), or there is a high likelihood that the person will be hospitalised or required to leave their current residence because they are unable to care for themselves, or their carer is unavailable. This may be due to a crisis in the home involving either the older person or the carer, or a sudden change in the older person or carer's medical, physical, cognitive, or psychological status. End-of-Life Pathway referrals are also in this category and should be prioritised for urgent action.	10 calendar days
Medium	Information available at referral indicates that the older person is not at immediate risk of harm. Referrals should be allocated to this priority category if they indicate progressive deterioration in the older person's physical, mental, or functional status, or that the level of care currently available to the older person does not meet their needs or is not sustainable in the long-term.	20 calendar days
Low	Refers to cases where the referral information indicates that the older person has sufficient support available at present, but that they require an assessment in anticipation of their upcoming care requirements. Examples include the carer planning a holiday, which will result in the care recipient requiring the provision of substitute care or recognition that the person is having increased difficulty living independently and options for	40 calendar days

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Priority Level	Definition	Timeframes (from day of referral acceptance to completion)
	care need to be discussed with the older person and their carer or family.	

4.2.3. Hospital assessment priority categories

The hospital setting includes aged care assessments in an acute setting, a public or private hospital, or other hospital inpatient setting.

Table 16. Hospital assessment priority categories

Priority Level	Definition	Timeframes (from day of referral acceptance to completion)
High	Requires an immediate response based on the information collected during the referral process (e.g., response within 2 calendar days and completion within 5 calendar days of referral acceptance).	5 calendar days
Medium	Information available at referral indicates that the older person is not at immediate risk of harm. Referrals indicate progressive deterioration in the older person's physical, mental, or functioning status, or that the level of care currently available to the older person does not meet their needs or is not sustainable in the long-term (e.g., response within 5 calendar days and completion within 10 calendar days of referral acceptance).	10 calendar days
Low	Information available at referral indicates an appropriate response within 10 calendar days and completion within 15 calendar days of referral acceptance).	15 calendar days

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For all priorities in the hospital setting, the expectation is that at the time the assessment is undertaken:

- The person is anticipated to be medically stable, unless they have a rapidly deteriorating condition that cannot be stabilised.
- The full range of clinical and rehabilitation support (to be provided by the hospital) are explored to ascertain the best care options for the older person on discharge from hospital. This may include:
    - multidisciplinary case conferencing with the carer and family
    - consultation with the hospital geriatric rehabilitation service or equivalent
    - consultation with members of the treating multidisciplinary team; and
    - liaison with hospital discharge planners.

Adverse effects on the older person of prolonged hospitalisation, or where a delay may disadvantage the older person from accessing the care option they need, are other factors that influence the decision on the priority.

4.3. Actioning referrals

Once a referral for assessment is issued, team leaders can action by accepting, rejecting or transferring the referral. After allocating to a Triage Delegate, it is only the team leader who can reject or transfer a referral. A referral can only be transferred once. The system also allows 'bulk' acceptance of referrals. If this functionality is used, the department expects that the referral has been appropriately reviewed prior to the team leader's decision to accept a referral. Referrals cannot be recalled or cancelled by the My Aged Care Contact Centre once the referral has been accepted.

Note:

Business allocation counts all referrals issued to the assessment organisation, regardless of the action (accept, reject or transfer).

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4.3.1. Preference for an Aboriginal and Torres Strait Islander assessment organisation

Some older Aboriginal and Torres Strait Islander people may prefer to be assessed by an Aboriginal and Torres Strait Islander assessment organisation, others may prefer the first available organisation regardless of who it is, and some may prefer to receive an assessment from a mainstream assessment organisation. The single assessment pathway supports the choice of each older Aboriginal and Torres Strait Islander person.

My Aged Care system functionality records if an Aboriginal and Torres Strait Islander client would prefer to have their assessment completed by an Aboriginal and Torres Strait Islander assessment organisation.

- This should be recorded when registering a client in the My Aged Care system
- It may also be recorded by an assessor during an assessment.
- The preference will then display in the client details as well as on the client's card.
- If one is available, Aboriginal and Torres Strait Islander assessment organisations will be represented with a prefix "FNAO-" and appear at the top of the list of

available services. If none is available in the region, then no organisation on the list will have the prefix.
- Team Leaders will get a warning when they try to transfer if the client has indicated a preference, if the assessment organisation is not an Aboriginal and Torres Strait Islander assessment organisation.
- Sometimes, the older person will want to know the name of the available organisation(s) before being referred to them.

An older Aboriginal and Torres Strait Islander person may also wish to change or remove their preference at any time; assessors are expected to support the wishes, will and preferences of the older person.

Note:

Aboriginal and Torres Strait Islander assessment organisations have commenced in some parts of Australia from August 2025.

In some regions while services are being established, an older Aboriginal and Torres Strait Islander person will not be able to be referred to an Aboriginal and Torres Strait Islander Assessment Organisation. Information about an older person's preference will be used to collect data on the demand for these services. Once Aboriginal and Torres Strait Islander Assessment Organisations become available, this preference information will be used to refer older people to these services if an assessment or Support Plan Review is needed.

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4.3.2. Providing assessment services as Aboriginal and Torres Strait Islander assessment organisations are being established

While Aboriginal and Torres Strait Islander assessment organisations are being established, older Aboriginal and Torres Strait Islander people will continue to be assessed by assessment organisations under the Single Assessment System.

If an Aboriginal and Torres Strait Islander client is already booked in with a mainstream Single Assessment System organisation, and an Aboriginal and Torres Strait Islander assessment service has recently become available in their area; the client should be advised of this option. They should be informed that choosing to be transferred to an Aboriginal and Torres Strait Islander assessment organisation may result in a longer wait time for an assessment. There will also be opportunities for the client to be transferred to the new organisation if their needs change in the future. The client's condition needs to be taken into consideration, that their health condition and care needs would not be adversely impacted by a delay in assessment if they were to be referred to another organisation. Unless the client opts to be transferred, the assessment should continue as planned.

Any preferences for Aboriginal and Torres Strait Islander assessment organisations should be uncovered during the assessor's pre-assessment planning. This allows the assessor time to organise transferring the client prior to the assessment if needed. If this referral is cancelled by the assessor at the point of assessment, this may slow down the assessment process for the client which is not the desired outcome.

A conversation to discuss this with the client prior to the assessment is recommended, to ensure that they have choice and control and the ability to make decisions regarding their care.

If the client's preference is to be assessed by the Aboriginal and Torres Strait Islander assessment organisation, the assessor can manage the referral according to the processes detailed in this Chapter.

4.3.3. Client scenarios for capturing the preference for an Aboriginal and Torres Strait Islander assessment organisation

Scenario 1: Capturing the preference of an Aboriginal and Torres Strait Islander Assessment Organisation even though there is not one available in the region.

Sharon is a triage delegate working for an assessment organisation under the Single Assessment System, who is triaging an older Aboriginal and Torres Strait Islander Client, Violet. Sharon is up to date with what organisations are available in the region and knows there is not an Aboriginal and Torres Strait Islander assessment organisation available yet; but that there may be one in future.

OPTION A: If there is no information in the FNAO preference field, Sharon needs to capture Violet's preference in case an Aboriginal and Torres Strait Islander assessment organisation becomes available in future.

"Violet, there are Aboriginal and Torres Strait Islander assessment organisations starting to provide aged care assessments in some regions of Australia. I can see that there is no preference logged in your record. There is not one available in this local region yet, but there may be one in future. If an Aboriginal and Torres Strait Islander aged care assessment organisation becomes available, would you prefer to receive future assessments from them? If so, I can record your preference so that you can be directed to those services in the future"

Violet indicates that she would prefer to be transferred to an Aboriginal and Torres Strait Islander assessment organisation in the future, and Sharon records the preference then continues to conduct the assessment.

OPTION B: If there is a FNAO preference captured in the preference field. Sharon notes the preference for an Aboriginal and Torres Strait Islander assessment organisation and knows that there is not one available. Sharon understands that this would have been explained to Violet at the point of triage. Sharon continues with the assessment as planned without asking Violet to unnecessarily confirm her preference multiple times.

After the assessment Sharon advises Violet that for continuity of care, any future reviews of her care will now come back to Sharon's organisation. Based on Violet's preferences, Sharon will keep that in place for now, and can transfer Violet to an Aboriginal and Torres Strait Islander organisation if available when the review is needed.

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Scenario 2: Prior to an assessment, the assessor sees the preference for the Aboriginal and Torres Strait Islander assessment organisation which has recently become available.

In the pre-assessment planning, Steve is an aged care assessor working for an assessment organisation under the Single Assessment System, who has an upcoming assessment with an older Aboriginal and Torres Strait Islander Client, Bill.

Steve has had this assessment booked in for some time and knows that since the assessment was booked, an Aboriginal and Torres Strait Islander assessment organisation has become available in the area. Steve wants to get the best outcome for his client, so contacts the client in advance to talk about the availability of the service.

“Bill, there are Aboriginal and Torres Strait Islander assessment organisations starting to provide aged care assessments in your area. I can see you have a preference to be assessed by an Aboriginal and Torres Strait Islander assessment organisation; and since we have had this appointment booked in, an Aboriginal and Torres Strait Islander assessment service has become available in this area. As we are meeting soon, would you like us to continue with the assessment?

If you would prefer to be assessed by an Aboriginal and Torres Strait Islander assessment organisation, I can refer you to them instead. This may take time. We would connect you with the organisation, and then they will be in touch as soon as they can to book an assessment with you. How would you like to proceed?”

Option A: Bill indicates that he would prefer to be assessed by an Aboriginal and Torres Strait Islander assessment organisation in the future, but to keep the process moving given his health and care needs, would continue the conversation with Steve as planned.

Steve advises Bill that for continuity of care, any future reviews of his care will now come back to Steve’s organisation. Based on Bill’s preferences, Steve can keep that in place, or transfer Bill to an Aboriginal and Torres Strait Islander assessment organisation when the review is needed.

Option B: Bill indicates that he would prefer to be assessed by an Aboriginal and Torres Strait Islander assessment organisation, he understands that this may take time to get booked in, understands the impacts to his health and aged care needs; and is happy to wait for the referral to be re-directed. Steve makes arrangements to transfer the referral for Bill (referrals and rejections are covered in Section 4.3of the manual).

Best practice for the client is that Steve supports the client’s choice and his organisation makes contact with the Aboriginal and Torres Strait Islander assessment organisation in the region to ensure that they have capacity, and support a warm handover to transfer Bill.

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During the scale up of services, it is important that assessors and assessment organisations stay up to date on which Aboriginal and Torres Strait Islander assessment organisations become available and where. To support this awareness:

- The department will provide updates in the monthly Aged Care Assessment Update newsletter at the end of each month.
- As services roll out, Aboriginal and Torres Strait assessment organisation outlets will be prefixed with “FNAO-” and appear at the top of the list of available organisations.
- Aboriginal and Torres Strait Islander assessment organisations are listed on the interactive map of available services.
- The Department’s website will be updated regularly.

4.3.4. Unlikely to be eligible for an assessment flag

If a client is found to be **likely ineligible** for an aged care needs assessment during screening, a flag titled ‘likely ineligible’ will appear on the client’s assessment referral once the Team Leader has accepted the referral in the My Aged Care Assessor Portal.

When actioning an assessment referral, Team Leaders may notice an option to reject an assessment referral by selecting the reason as Ineligible at Triage. However, Team Leaders should not use ‘Ineligible at Triage’ reason to reject a referral.

Using this rejection reason will prevent the client from being formally triaged by the Triage Delegate. If there is no other valid reason to reject the referral (such as the client is deceased, medically unstable, no consent etc.), and the client’s assessment referral is flagged as ‘unlikely to be eligible’, the Team Leader must accept and assign the assessment referral to a Triage Delegate to determine eligibility for assessment.

This flag is an indication only; the decision whether an individual is eligible for an assessment must be made by a Triage Delegate, who acts as the System Governor under the *Act*.

A client who has been found ineligible at triage for an aged care assessment must be sent an ‘Ineligible for Assessment’ Letter (known as 'Notice of decision not to make an eligibility determination' notice). The letter must be uploaded as an attachment on the client’s online account via the My Aged Care Assessor Portal. For further information see Chapter 9.

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Note:
If the older person was previously found ‘likely ineligible’ during screening and later is eligible the screening information will not change as screening can only be completed once. Triage Delegates should be diligent in reviewing an older person’s record to ensure they are eligible for an assessment.

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4.3.5. End-of-Life pathway flag

Assessors can undertake High Priority Assessments for new End-of-Life clients. The IAT will include system capability for team leaders and triage delegates to flag clients as an 'End-of-life client' through the High Priority assessment process. The aged care assessment referral will be flagged as an 'End-of-Life referral' and will be given a high priority.

Team Leaders and assessors will be able to filter for End-of-Life clients.

The End-of-Life Pathway Form does not need to be attached to the client's record for the assessment to proceed. If an End-of-Life Pathway Form has not been submitted, the team leader or triage delegate should advise the older person of the steps required (e.g. downloading the form and/or visiting their GP or nurse practitioner to have the form signed).

The End-of-Life Form must be uploaded and verified prior to the Support Plan being completed. Prompts will show to ensure the form is verified. If an assessment referral has been received with an End-of-Life flag, the End-of-Life form can be verified by clicking on the 'edit' icon. During an assessment it can be verified by selecting the 'Verify End of Life Form' Button. The form can be verified as:

Table 17. End of Life Form verification options

Option	When to use
Document Reviewed - valid	The correct, complete document has been uploaded.
Document Reviewed – pending	The documentation is either incomplete or not provided.
Document Reviewed – invalid	The End-of-Life pathway is no longer needed or the documentation is invalid.

Note:

The End-of-Life Pathway can be flagged at any stage of the individual's assessment journey

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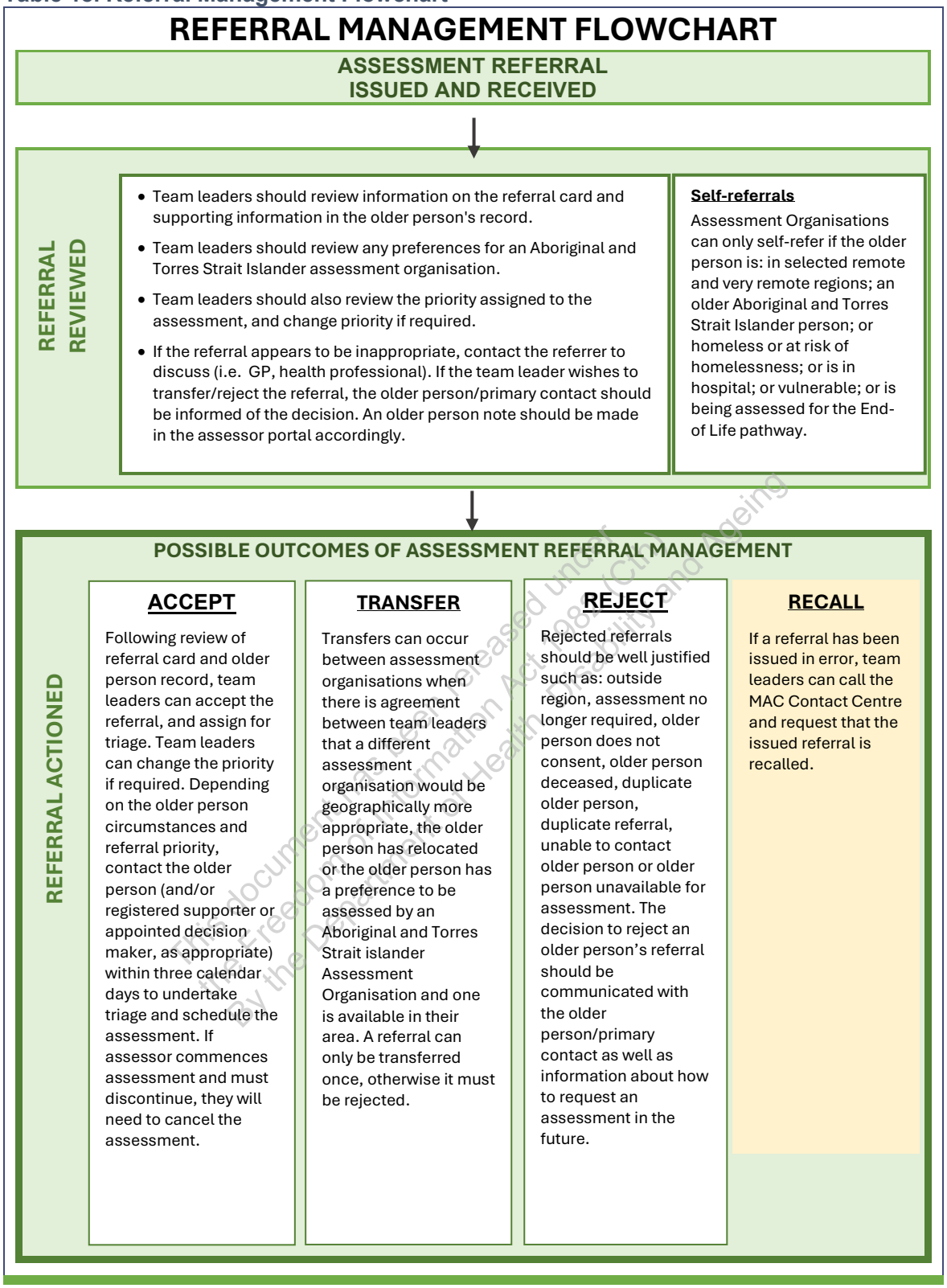
Table 18. Referral Management Flowchart



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4.3.6. Accept a referral

When a Team Leader receives a referral, they should view the older person's information to gain a preliminary understanding of their situation, to determine whether the referral is accepted, transferred or rejected and to begin the assessment process responsive to the person's individual situation.

A Team Leader must:

- Review the referral information and determine whether the referral is appropriate to be accepted, transferred or rejected.
- Determine whether the referral has been made to the right organisation or outlet (e.g. the older person is in the same geographical location).
- Note any concerns for the triage delegate's consideration relating to eligibility for aged care services
- Note any preference for an Aboriginal and Torres Strait Islander assessment organisation.
- On receiving an assessment referral, any relevant information relating to the older person's referral should be reviewed. Information can be sourced from the older person's record, including:
    - previous screening/assessment details
    - previous Support Plans
    - previous approvals
    - attachments (e.g., hospital discharge summary)
    - notes
    - interactions; and
    - primary contact/registered supporter/agent for the older person.

- Check that the older person's contact details and preferences are accurate and up to date in My Aged Care and amend as necessary. For older people who are approved and seeking services, the Team Leader must ensure the accuracy of the older person and their support network's contact information as this will ensure correspondence is received.
- Check whether a supporter or agent for the older person has been registered or established. If the client is already registered in My Aged Care, Team Leaders can use the assessor portal to find the client, then view their support network (if any supporter relationships have been registered).
- Review the priority assigned by the referrer and change it if it does not align with the guidance on priority for assessment referral. Once a referral is received, it is important that older people are contacted and seen in a timely manner, especially those with urgent needs.
- As web referrals (including referrals submitted by GPs, health professionals and older people using the 'Apply for an Assessment Online' form) are automated to a **medium** priority, it is important to review the referral information and reassign the priority (if applicable) according to the older person's needs. This will prevent urgent cases from being overlooked.

- Older people and/or their registered supporters should be contacted and eligibility determined through triage within three calendar days of accepting the referral.
- Note that assessors should consider workload management between focusing on SPRs versus reassessments to ensure priority is given to older people with the greatest need.

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4.3.7. Transferring referrals

Team leaders can transfer incoming and accepted referrals (that have not been commenced) between assessment organisations. Transfers can occur between assessment organisations when there is agreement between those organisations' team leaders that this is necessary (e.g. due to the location or organisational capacity issues or the older person has a preference to be assessed by an Aboriginal and Torres Strait Islander Assessment Organisation). A referral can only be transferred once. However, assessment outlets should consider the reasons carefully before rejecting a referral.

Where a referral has been transferred the assessment organisation must ensure that:

- The older person understands why their referral is being transferred and consents to the transfer of the referral to another assessment organisation.
- They have contacted the assessment organisation that will be receiving the older person's referral to confirm that they will accept the referral. A referral should not be transferred before confirmation has been obtained that it will be accepted by the receiving assessment organisation. This ensures that the older person does not experience any delay in having an assessment.

4.3.8. Rejecting a referral

Team leaders can reject a referral when first managing the referral or reject or transfer a referral after acceptance. Once an assessor starts the assessment, they will need to cancel it if the assessment should not proceed.

Note:
If the assessment is going ahead, but needs to be reassigned to another assessor, it should not be cancelled.

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If rejecting a referral, a rejection reason from the list of values needs to be selected and relevant comments added on the reason for the rejection where further explanation is required.

Table 19. Referral rejection - List of values

Client/family/rep unavailable	Client age – alternate options
Duplicate client record	Client does not consent
Interpreter not available	Client deceased
Unable to contact client	Clinical staff not available
Outside assessment region	Client prefers a FNAO

Assessment no longer required	Hospital assessment required
Care approval meets needs (the client is receiving aged care services and they are sufficient)	Client prefers later assessment
Client medically unstable	Other

Note:

The department monitors the rejected referral rates and rejection reasons.

Referral rejection decisions need to align with good practice and place the older person's interests at the centre of the decision. Referrals should only be rejected after careful consideration and for valid reasons.

The following types of situations are examples where rejecting a referral or cancelling the assessment may be required:

- The assessor is unable to transfer the referral to another assessment organisation.
- A referral may be rejected if it is outside the assessment region, or the older person does not consent to the assessment. An incorrect referral priority is not a valid reason to reject a referral.
- The older person has been admitted to hospital so the assessment is no longer required.
- The older person is medically unstable.
- The older person does not consent, withdraws their consent, is no longer seeking services and/or withdraws their application for assessment.
- The older person has passed away.

- There is a duplicate older person entry or a duplicate referral.
- There is insufficient information to proceed with the referral, or the older person is unable to be contacted after many attempts.

- The older person prefers an Aboriginal and Torres Strait Islander Assessment Organisation where one is not available, and after discussing the risks of waiting; would prefer to wait until one is available than proceed with a mainstream assessment organisation.

It is recognised that building rapport and trust with older Aboriginal and Torres Strait Islander clients may require multiple contact attempts, particularly for individuals who have experienced trauma or institutionalisation. Assessment organisations should make all reasonable efforts to engage with the client in a respectful and culturally safe manner with their advocate if they have identified they are in contact with one.

Aboriginal and Torres Strait Assessment Organisations are encouraged to consider culturally safe engagement strategies, such as involving trusted agents like Elder Care Support Connectors or other appropriate advocates as well as arranging face to face contact where possible.

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Note:

Rejecting a referral should be used as a last resort. A transfer prior to the assessment is preferable to a rejection.

The rejection reason *'Client prefers a FNAO',* is available in the IT system. An older Aboriginal and Torres Strait Islander person should not be rejected based on an older person's preference unless it is a last resort. A transfer prior to the assessment is preferable to a rejection.

In instances where an Aboriginal and Torres Strait Islander older person is already booked for an assessment with a mainstream assessment organisation, but an Aboriginal and Torres Strait Islander service has recently become available, it is recommended that the assessor continue the assessment as planned with the agreement of the older person. The older person's condition needs to be taken into consideration; that their health condition and care needs would not be adversely impacted by a delay in assessment if they were to be referred to another organisation.

Any preferences should be identified during the assessor's pre-assessment planning, allowing the assessor time to organise the transfer of the older person to another organisation prior to the assessment. If the referral is cancelled by the assessor at the point of assessment, this may slow down the assessment process for the older person, which is not the desired outcome.

A conversation to discuss this with the older person prior to the assessment is recommended, to ensure that they have choice and control and the ability to make decisions regarding their care.

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In circumstances where the older person and/or their registered supporter or primary contact is unable to be contacted after a number of attempts, assessment organisations should have a procedure in place to manage the referral request. For example, this may cover:

- the expected number of contact attempts (and documentation of attempts)
- who should be contacted
- ensuring special needs (e.g., identified hearing impairment) have been considered
- whether, after a number of unsuccessful contact attempts, a letter is provided advising the older person and their registered supporter how to reactivate their assessment referral request, or informing the older person and their registered supporter (and appointed decision maker, if they have one) if they are rejecting, transferring or cancelling their referral (including an explanation of the reason/s).

The decision to reject a referral must be communicated to the older person/primary contact/appointed decision maker with information about how to request an assessment in the future. Effective communication with the older person/registered supporter on a decision to reject the referral, and effective communication between assessors, assists with managing expectations and reducing complaints.

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4.3.9. Recall a referral

Where a referral is issued to the organisation inappropriately and is not at the status of 'rejected' or 'transferred', the team leader may request that the My Aged Care Contact Centre recall the referral.

The My Aged Care contact centre can recall referrals if it was:

- Sent in error by the My Aged Care contact centre.
- Sent to the wrong organisation and meets the requirements for transfer.

You can call the My Aged Care Service Provider and Assessor Helpline (1800 836 799) if you need a referral recalled. Note, the team leader of the outlet will receive a system notification if a referral has been recalled.

4.4. Self-referrals

The circumstances in which an assessor can self-refer an assessment referral to themselves or their assessment organisation (and team leaders with a system assessor role) are limited to assessment referrals:

- in a hospital setting
- in remote regions – (Monash Modified Model 6-7)
- for Aboriginal and Torres Strait Islander people
- for older people at risk of or are experiencing homelessness
- vulnerable groups (e.g. experiencing or at risk of domestic or family violence or elder abuse, at risk of hospitalisation, primary carer is absent or non-existent)
- End of Life

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In these circumstances, an assessor can self-refer older people to themselves through the My Aged Care assessor portal and app.

Where the assessor identifies a potential older person with aged care needs that is cohabitating with the current older person at the time of the assessment, the assessor may wish to encourage that person to contact and register with My Aged Care My Aged Care to register for My Aged Care and request an assessment.

When creating the self-referral, assessors are encouraged:

- to upload any additional documentation relevant to the older person's situation (for example, a hospital discharge notice),

- Provide any reasoning relating to the person's vulnerability under the 'Notes' tab in the assessor portal. With the older person's consent, sensitive information should be recorded in sensitive notes and attachments. Triage and self-referral

All individuals seeking access to funded aged care services are required to undergo triage to determine their eligibility, even if they are self-referred by an assessor. Triage Delegates should be aware assessors are able to complete triage during a self-referred assessment. Unless an assessor also holds the Triage Delegate role, they must complete triage for a self-referred assessment under the supervision of a Triage Delegate.

A Triage Delegate must actively supervise triage conducted by an assessor, via phone or video conferencing. The decision whether someone is eligible to undergo an assessment,

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remains with the Triage Delegate and should not be made in their absence. If a delegate is not available to supervise triage the assessment should be paused until such time a delegate becomes available. Assessors conducting triage during a self-referred assessment must nominate the supervising Triage Delegate. Triage will be unable to be completed unless a supervising delegate has been nominated.

Note:

For triage to be enabled in the Aged Care Assessor App (the App) for self-referred assessments, the referral must be generated in the App. If a referral is generated in the My Aged Care Assessor Portal, it will first need to be triaged before assigned to an assessor to complete the assessment.

4.4.1. Conducting triage and self-referral for likely ineligible individuals

There may be circumstances where an assessor self-refers an individual who is 'likely ineligible' for an assessment. Assessors should not advise any person seeking access to funded services they are not eligible for an assessment, that decision remains with the Triage Delegate.

In community settings when an assessor identifies someone who is likely ineligible for an assessment, they should encourage the person to contact the My Aged Care Contact Centre to apply for funded aged care services. Assessors should avoid self-referring individuals they think are likely ineligible.

When self-referring an individual who is likely ineligible in an in-hospital setting, assessors should refer the individual to an assessment organisation, not to themselves. This approach ensures the referral is appropriately actioned first by a Team Leader and then allocated to a Triage Delegate, for a determination to be made. If an individual is determined to be eligible, the referral will then be allocated to an assessor to complete an assessment.

These processes are only applicable to individuals who have been identified as likely ineligible. If there are no concerns about an individual's eligibility, assessors may refer the individual to themselves and conduct triage under the supervision of a Triage Delegate.

4.4.2. Prevention of duplicate records

When registering an older person on My Aged Care, the assessor must always first search for an older person's record to see if they exist. If no existing record is found using the search function, assessors should view any potential matches that are returned by the system when creating the new client record.

Prevention of duplicate records is of particular importance to assessors who can undertake self-referrals to themselves and in doing so are required to register an older person.

Duplicate older person records occur when an older person is already registered in My Aged Care and a new older person record is created for the same older person.

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Duplicate older person records can have a significant impact on an older person's experience with the My Aged Care process including:

- care approvals across multiple records
- referral for assessment where an assessment has already taken place
- delaying access to services
- providers unable to claim subsidies.

If the assessor observes a duplicate record already exists, report the duplicate to the My Aged Care Service Provider and Assessor Helpline (1800 836 799).

4.4.3. Verifying the individual's legal name

Assessors should use the wallet check process to verify the individual's legal name and age (see section 5.6, Commencing the Assessment, and section 5.6.2 Wallet check).

Legal name vs preferred name

- When searching for an older person to determine if they already have a My Aged Care older person record, the assessor must ask if the older person prefers to go by a name other than their legal name.
- Conducting searches under each name can help to identify if a previously created record exists.
- Use the wallet check process to verify individual's legal name (see section 5.6Commencing the Assessment, and section 5.6.2Wallet check).
- When a record does not exist and you are creating the record, use the legal name in the first name field.

Once the record is created, add a preferred name in the field provided in the personal details section of the older person record.

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Note:

It is important to keep in mind when verifying an older person's legal and preferred name that in some Aboriginal and Torres Strait Islander traditions or communities, people can change the name they use throughout their life or be known by different names by different people owing to their changing role/status in their community or events such as the death of a person.

This may also be relevant in other cultures. If appropriate and safe to do so, an assessor should explore all names an older person has had in the years they would have been eligible to receive aged care services.

Additional information in name field

- Do not add any additional information in the name fields – putting the relationship of a person to an older person in the name field, for example Mary (Daughter), will prevent the system from matching that record in future searches and may cause the creation of a duplicate record.
- Any additional information that does not have a predetermined field can be entered into the 'Notes' section of the older person record.
- Where possible, you should enter the older person's date of birth as opposed to entering the older person's age.

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Special characters

When completing the name fields for an older person record only use the following characters:

- alphas (letters)
- hyphens
- apostrophes; and
- blank spaces

Any other characters (such as brackets, commas, and full stops) are considered invalid characters and can prevent other users from being able to find the records. This can lead to the creation of duplicate records.

4.5. Support Plan Reviews and reassessments

Section 64 of the *Aged Care Act 2024* provides for aged care needs reassessments. A reassessment may be required when an individual's circumstances have changed significantly, or other circumstances apply to the individual. The Rules prescribe the relevant change in circumstances that may necessitate a reassessment under 64-5 (for significant changes) and 64-10 (for other circumstances).

In the *Aged Care Act 2024* the term 'reassessment' is used as an umbrella term to describe both SPRs and a reassessment for someone already receiving funded aged care services. An individual may request a reassessment if they believe their aged care needs have changed, or it may be identified through a scheduled SPR.

Note: in this manual, the term 'reassessment' is used to describe an assessment that occurs after an older person has already been assessed at least once. From 1 November, SPRs will be used as a mechanism to adjust an older person's aged care services without needing to undertake a full, reassessment. A reassessment will be conducted when there are *significant* changes to a client's needs or circumstances.

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In some cases, the Assessment Delegate may approve access to services based on updated information through the SPR process.

However, in cases where a *significant* change is identified, a new aged care needs assessment must be undertaken. Significant changes in care needs and circumstances requiring a higher-level of care or different types of care (and/or changes to priority) will require a reassessment.

For example, an older person approved for ongoing Support at Home Classification 4 who requires a higher classification (e.g. Classification Level 5) due to increased care needs or a change in priority for home care service must undertake a reassessment by an assessor. They will then receive a new approval by an Assessment Delegate.

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Significant change is referenced in section 64 of the *Aged Care Act 2024 (the Act)* and defined in the *Aged Care Rules 2025*:

- a carer for the individual has permanently ceased to provide some or all care to the individual;
- the individual has experienced an event, or a decline in their condition, that is likely to mean that they will require:
- more frequent access to a service they are already receiving, or
- access to a service they have been approved for but are not currently receiving, or
- access to new services not covered in the older person's access approval.

The Triage Delegate will determine whether an individual is eligible for a reassessment. The information required by Triage Delegates to confirm a reassessment will be gathered by assessors during a support plan review.

All reassessment requests, including reassessments, begin through the SPR workflow in the assessor portal. A reassessment will be requested if required.

When a client undergoes a reassessment, the system will prompt assessors to review and update the client's urgency category, even if care needs have not changed.

One exception to this is the End-of-Life Pathway, where an SPR can be used to transfer a current Support at Home participant from an ongoing classification onto the End-of-Life Pathway.

Further information on SPRs and reassessments see Chapter 10.

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Under paragraph 195(3) of the Act, a provider may submit a SPR to request a second concurrent unit of Restorative Care Pathway (RCP) funding for a person already approved for, and accessing, the RCP. To approve the SPR, the Assessment Delegate must consider the evidence provided outlines sufficient justification of higher needs for multidisciplinary allied health and/nursing services to achieve identified restorative care goals. Assessment Delegates may also consider the availability of RCP funding units for allocation.

4.5.1. SPR and reassessment requests

A SPR request will be referred to the assessment organisation that undertook the most recent assessment.

A SPR may be requested by:

- the older person/registered supporter (through the My Aged Care Contact Centre or ACSO)
- a service provider (through the My Aged Care Service and Support portal)
- a GP, hospital, or community health professional through the My Aged Care contact centre or a My Aged Care web referral.

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Note: If a web referral is received by the My Aged Care Contact Centre, they will create a SPR request.

- If a reablement or linking support period is open, the team leader will ask the assessor to finalise the support period so the SPR request can be issued

- the assessor may initiate a SPR without requiring a request or scheduled SPR.

Note:

A SPR may be requested when an older person is undergoing reablement and/or linking support.

If the older person is undergoing reablement or linking support, the team leader will not be able to assign the SPR until the support period is marked as completed.

To allow continuity of the support period, the assessor can re-add the support period during the SPR.

The My Aged Care Contact Centre, ACSO and service providers should include the following information when requesting a SPR or reassessment:

- why the request has been made (e.g., older person's circumstance)
- what is the request for (e.g., service type) and why it is needed (e.g., older person's change in needs or goals)
- if the request is urgent and why it is urgent
- if the person has a preference to be assessed by an Aboriginal and Torres Strait Islander assessment organisation
- what services the older person is currently receiving
- identify options explored with the older person to increase their current support
- attach supporting documentation where relevant
- identify significant changes in circumstances that the older person has experienced

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4.5.2. Managing an SPR request

Upon receiving a SPR request and understanding the client's preferences and needs, the team leader should consider the most appropriate action:

- assign the request
- transfer the request
- recommend a reassessment, or
- cancel the request

While no priority category for SPRs exists as it does for assessment referrals, assessors should consider prioritising SPRs where there is an identifiable urgent need. This helps ensure older people who require a higher level of care and services due to their condition are afforded an appropriate assessment with minimal delays. In particular, assessors should prioritise:

- End-of-Life SPRs, completing them as soon as possible. These will be marked 'urgent' in the system.
- Referrals where referral information indicates a significant event has occurred or the older person has a rapidly deteriorating condition, all of which will likely result

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in a reassessment. This will help ensure prompt review by a Triage Delegate, who may recommend interim CHSP services for the individual.

- Requests for **a second unit of restorative care** where there is a need for continuity of services

Otherwise, assessment organisations should make contact with the older person's primary contact (who may be the older person, registered supporter, appointed decision maker or agent organisation) about a non-urgent SPR request within **two** to **four** weeks. SPRs should be completed within 15 days from the date of the SPR referral is accepted, with priority given to older people with the greatest need (as specified within the request indicated by providers or by the My Aged Care contact centre/ACSO).

Transfer the request

In some instances, assessment organisations may need to transfer the SPR to another assessment organisation or return the request to the My Aged Care contact centre. If the former, it is recommended that the assessment organisation contact the other assessment organisation to confirm the transfer before actioning in the system.

Note:

Extra care will need to be taken by team leaders during the staged rollout of Aboriginal and Torres Strait Islander assessment organisations.

There may be instances where a client has had previous interactions with a single assessment system organisation yet has a preference for an Aboriginal and Torres Strait Islander assessment organisation when one becomes available.

In this instance, it is recommended that the client be transferred to an Aboriginal and Torres Strait Islander organisation as per the current warm transfer process.

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Recommend a reassessment

If the older person's circumstances have significantly changed and it is more appropriate to request a reassessment rather than completing a SPR, select 'Recommend a reassessment'. The Triage Delegate will then determine whether or not a full reassessment is required.

Cancel the request

Actions if considering cancelling the SPR:

- If there is insufficient information on the SPR request, however clarification is required on certain aspects, the assessor should contact the older person or service provider where possible to clarify the request, prior to progressing a decision to cancel the SPR. This will manage the risk to older people to ensure the older person is not disadvantaged where they require changes to their aged care support.
- The review request may be cancelled by an assessor and a SPR not undertaken if it is inappropriate or if insufficient information is provided to warrant the SPR, or the assessor (after a number of attempts) has not been able to contact the older person's primary contact (who may be the older person, registered supporter, appointed decision maker or agent organisation).

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- As a minimum requirement, where the assessor cancels the SPR, they must include the cancellation reason and provide clear explanation justifying the cancellation in the cancellation details field.
- Indicating a clear cancellation reason allows the person making the request to, if necessary, amend and resubmit the request or follow up with the assessor as necessary.
- Where, through the course of the SPR conversation, the older person and/or their supporter considers no changes are required, they may agree that the SPR can be cancelled and withdraw their application. A notice of decision advising on this outcome is not required as the applicant's application is taken to be withdrawn.

Note:

If an older person is requesting a reassessment, an SPR should be undertaken in the first instance. Doing so will allow the assessor to review whether there has been a significant change in aged care needs and referring for a reassessment is warranted.

In most circumstances, the cancellation of the SPR should only occur where the older person or active, appointed decision maker, (whether registered as a supporter or not), understands and agrees to the cancellation of the SPR. A registered supporter can communicate information, including the decisions of the older person.

This is also applicable where the assessor decides to cancel an SPR due to the older person having been recently provided with an SPR and there has been no change in the older person's care needs or situation since the SPR was conducted.

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4.6. Deceased older people

Team leaders and assessors can notify My Aged Care of a deceased older person or registered supporter through the assessor portal to change the older person's record status to inactive. If assessors are aware of this information during the assessment process, they should complete the notification from the client details tab by selecting the 'Notify My Aged Care of a death' button.

Alternatively, the assessor can complete the notification process by selecting 'Older person deceased' from the drop-down list when:

- rejecting a referral for assessment; or
- cancelling a support plan review.

In the case of a client passing away before an assessment could be completed, assessors should follow the 'client deceased before assessment' process available through the My Aged Care assessor portal. For further information, see the 'exceptional circumstances' section 3.5 of Chapter 3.

My Aged Care – Assessor Portal User Guide 1 – Registering and referring older people
My Aged Care Assessor Portal User Guide 3 – Managing Referrals for Assessment and Support Plan Reviews
My Aged Care – Assessor Portal User Guide 4 – Navigating and updating the older person record

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5. Chapter 5: Assessment activities

What you'll find in this chapter

This chapter includes important information about how to undertake an aged care needs assessment and complete a support plan for an older person. It outlines the different services and programs that can be recommended to meet an older person's needs and goals. This chapter includes:

- Consent for triage and assessment
- Triaging Assessments and Triage Delegate role
- Revocation of Eligibility
- Undertaking a needs assessment using the IAT
- Assessment settings
- Clinical attendance
- IAT outcome
- Recommending service types and services
- Converting a home support assessment to comprehensive assessment
- Support Plan
- Wellness & Reablement Approach
- Recommending time-limited reablement under CHSP
- Linking Supports
- Assessment wrap-up

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5.1. Obtaining consent for triage and assessment

Assessors must obtain consent, written or verbal, from the older person prior to undertaking triage and assessment.

When obtaining the older person's consent to the assessment or before disclosing an older person's personal or protected information to other parties, the department requires that assessment organisations establish policies and protocols that include the following considerations:

- Triage Delegates or assessors must use the applicable consent script online via the Assessor Portal (or in the app in the case of self-referrals).

- The Triage Delegate or assessor should read out the consent script/s to ensure the older person understands and is informed of the purpose for collecting the information and how it will be used and stored, and who the personal or sensitive information will be collected from (such as contacting a person's GP, other health professionals, disability service coordinator or service provider, family members or carers). If the older person prefers, the older person can read the consent script/s themselves on a printed form.

- For offline assessments the assessor must use a hard copy version of the My Aged Care Assessment Consent Form. This form includes the consent scripts and fields to record the consent for assessment and service referrals. It is located via the *Reports and Documents* tile within the My Aged Care assessor portal.

- While the My Aged Care Assessment Consent Form and scripts should be used to obtain consent from the older Aboriginal and Torres Strait Islander client, assessors should take care to adapt the consent script to ensure that it can be clearly understood.

- Given that many Aboriginal and Torres Strait Assessment Organisations also deliver other services to the community such as Health, aged care or/and Elder Care Support services, consent must be obtained from the client before using information gathered through these services to inform the aged care assessment. Under all circumstances, clients should be given a genuine choice whether they wish to receive an assessment or services from a particular service organisation and should be given the option to seek services from other providers if they so choose.

- An older person may wish to be supported by someone during their assessment. This could include a trusted family member or friend, advocate or cultural broker, care finder or elder care support worker, or community representative. These people do not have to be registered as a supporter under the Act to attend the assessment and support the older person.

- Note that if a care finder has an Agent relationship established with the older person, the assessor should contact the care finder to assist in scheduling the assessment. The client should explicitly be asked if they would like the care finder to attend the assessment.

- An older person may want, or have, a registered supporter. A registered supporter is a person who is registered under the Act to help the older person make and communicate their own decisions. Registered supporters have duties they must uphold. These include to act in a way that promotes the will and preferences of the older person they are supporting and support the older person only to the extent needed for the older person to make their own decisions.

- Some supporters also have guardianship, enduring power of attorney or similar legal authority for the older person. If the older person is not able to give consent at triage or assessment because they are experiencing a loss of decision-making ability, the assessor should check whether they have an appointed decision maker who has active, legal authority to give this consent, whether or not they are yet registered as a supporter. An appointed decision maker can only make decisions on the older person's behalf in line with their active, legal authority.

- Appointed decision makers are encouraged to register as supporters. However, they are not required to register as supporters in order to exercise the authority they have under a Commonwealth, state or territory arrangement. Assessors can engage with these people before they have formally registered as supporters, as long as the assessor is satisfied that they are an active, appointed decision maker for the decision/s asked. That is, the appointed decision maker is acting within their authority.

- The assessor may make an informal assessment of an older person's decision-making ability if the assessor is aware of matters that may suggest that the older person does not have decision-making ability and consequently may not have legal capacity to provide informed consent. If the assessor is satisfied that the older person does not have capacity to consent to the assessment, the assessor cannot continue with the assessment unless the assessor can identify another person who can consent on the older person's behalf.

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- If an appointed decision maker is required but is not yet in place, people supporting the older person will need to be referred to the processes in their state or territory for appointing decision makers (see Note below). These usually involve formal assessments of decision-making ability by medical practitioners like geriatricians. If an older person has no support network, assessors may consider connecting with the older person's treating medical practitioner such as a GP, if this information is known.

- The older person must be able to make an informed decision about whether they want their personal information disclosed to others. When the older person consents to an assessment, they must be made aware that they are agreeing to their personal information being collected for the purposes of the assessment and, where appropriate, disclosed to or used by other parties for the purposes of providing aged care or other community, health, or social services to the older person. Reference should be made to consent scripting and/or privacy collection notices, where available.

- An older person's right to confidentiality must always be respected. If an assessor considers that maintaining confidentiality will interfere with or compromise their role in relation to an older person, the matter should be discussed with the older person. This discussion can also involve a registered supporter, if the older person wants their registered supporter involved. This discussion can also involve an older person's appointed decision maker, if their active, legal authority relates to the personal information the confidentiality issues relate to.

- When sharing information from an older person with other parties, assessors should ensure the information is shared securely and is received by individuals who are authorised to receive the information on a 'need to know' basis.

- Ensure that third parties who receive an older person's information are aware of privacy requirements and have procedures in place to ensure that the older person's information is not misused.

- If using online consent, the triage delegate or assessor must use the My Aged Care portal prompts to indicate that consent to triage/assessment was provided. If the older person does not wish to give consent, the triage delegate or assessor will be required to select a reason for not providing consent.

- If using the Consent Form, the assessor must record the informed consent in the My Aged Care Assessment Consent Form and upload it in the older person's record through the 'Attachments' function. The assessor can then use the 'Notes' section in the older person's record to:

    - indicate the signed form has been uploaded and consent given

    - record any detail the circumstances regarding any disclosure of an older person's personal information, and

    - record any instructions relating to the assessor's conversation on informed consent with the older person (and/or active appointed decision maker) and where relevant, any registered supporters.

- If a carer is identified for the first time during the assessment under the 'Carer profile' section of the IAT, the assessor must confirm with the older person that the

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older person has the carer's consent to provide the carer's telephone number and related personal information.

- Older people must be made aware that once consent for assessment is gained for the use and disclosure of personal information as authorised by the *Privacy Act 1988* (Cth) (Privacy Act), these records need to be retained in accordance with the *Archives Act 1983*.

- When seeking consent to make the older person's Support Plan available in their My Health Record (MHR), the assessor should ensure the older person understands that their GP, along with other authorised health professionals, will also be able to view their Support Plan on MHR. The assessor can make a note that the older person does not have to give their consent. They can also withdraw their consent at any time by calling the My Aged Care Contact Centre and requesting removal of their Support Plan from MHR.

Note:

1. If consent cannot be given by the older person or their active, appointed decision maker (either registered as a supporter or not), the triage or assessment cannot proceed, and the referral is rejected.

2. The assessor should discuss the implications of approving a Disability Support for Older Australians (DSOA) client for aged care, ensuring DSOA clients are informed of the considerations relating to their DSOA funding and supports when they consent to proceed with the aged care assessment. DSOA clients must confirm they understand that if they are deemed eligible for aged care services their DSOA funding is capped, or they may be required to exit the existing DSOA Program (see Chapter 6).

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Privacy notice and consent web page

Federal Register of Legislation website: Aged Care Act 2024 - Federal Register of Legislation

The Privacy Act 1988

Healthdirect website: Healthdirect Privacy policy

My Aged Care website: Arranging someone to support you

Privacy Policy | My Aged Care

5.2. Triaging assessments

Triage is performed after the acceptance of a referral and prior to conducting an aged care assessment. Triage is conducted for every accepted referral, generally over the telephone and should occur within three calendar days of accepting a referral. Triage helps ensure that older people with low needs are not over-assessed and that those with complex needs have access to a comprehensive assessment. Triage also aims to validate the outcomes produced at screening, including the priority allocated to the assessment and whether urgent services are required. For participants seeking access to

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the End-of-Life Pathway who have submitted their End-of-Life Pathway Form at this stage, triage may also involve verifying this documentation. In addition, the triage process includes scheduling the assessment, work health and safety screening, arrangements for communication needs and confirming support people ahead of the assessment.

Depending on the older person's circumstances and referral priority, triage delegates should undertake triage with the person and/or the nominated contact within three calendar days of accepting the referral. Older people will require faster response times based on level of risk and need.

Please note for Aboriginal and Torres Strait Islander assessment organisations. In alignment with targets under Outcome Two – Culturally safe, accurate and prioritised assessment under the Aboriginal and Torres Strait Islander Aged Care framework, the client or their representatives should be contacted and an eligibility determined through triage within 10 days of a referral being accepted by the Aboriginal and Tores Strait Islander Assessment Organisation. This timeframe acknowledges the importance of culturally safe engagement, including the need for multiple contacts and additional time that may be needed to establish trust and rapport with the client. However, the timeframe will be dependent on the client circumstances and referral priority. The timeframe should not compromise on older people being able to access timely aged care services. To avoid disadvantaging the client, assessment organisations should still aim to complete the triage process within 3 days to enable the older person to receive a timely assessment.

If an Elder Care Support worker has been facilitating an older person's access to the aged care system, the assessment organisation should, with consent from the client, involve the Elder Care Support worker in the triage process.

Where an assessment is self-referred, and the assessor is with the client, the assessor may be able to conduct triage with the client at the same time as the assessment. If the assessor is not a Triage Delegate, the Triage must be completed with oversight from a Triage Delegate. Note that, in the instance of self-referral, triage constitutes one of the 'approved forms' under section 56 of the Act.

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5.2.1. Delegation to the Triage Delegate

The Triage Delegate has powers and functions afforded to the System Governor under the Act delegated to them. Section 58 of the Act relates to eligibility for an aged care needs assessment.

Within an assessment organisation, the person holding a Triage Delegate role must meet certain qualification (detailed in Appendix G) and training requirements (detailed in the Learning Strategy).

The role of the Triage Delegate is to determine whether an older person is eligible for a needs assessment for funded aged care services. Prior to 1 November 2025, an older person's eligibility for assessment was determined by the My Aged Care contact centre after a person was screened. Under the Act it is determined by the Triage Delegate.

The Triage Delegate, in reaching their decision to find someone eligible for a needs assessment, must be satisfied the older person meets the age eligibility requirement and has declared they have an aged care need.

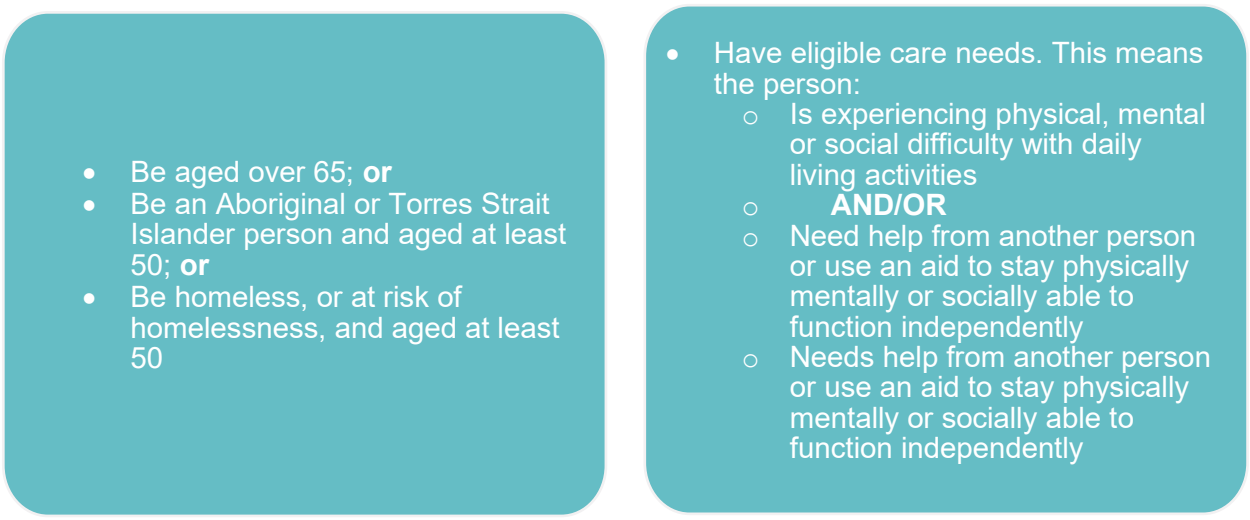

Figure 1 - Eligibility requirements

In doing this the Triage Delegate must check all information available on the older person's My Aged Care record to confirm:

- the older person's date of birth, by checking with the older person, their registered supporter and/or active, appointed decision maker
- that the older person has declared they have care needs, noting this can be made by the older person through the registration and screening process or through a written statement from a person applying on the older person's behalf, or through written medical records (see section 58-5 of the *Aged Care Rules 2025*)

for older people who have already been assessed at least once, the older person has had a significant change in circumstances and a reassessment is required. Significant changes are provided for in the *Aged Care Rules 2025* and include:

- a carer for the older person has permanently ceased to provide some or all care to the older person;
- the older person has experienced an event, or a decline in their condition, that is likely to mean that they will require:
  - more frequent access to a service they are already receiving, or
  - access to a service they have been approved for but are not currently accessing, or
  - access to new services not covered in the older person's access approval.

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Eligibility considerations for older Aboriginal and Torres Strait Islander people

The assessment process for Aboriginal and Torres Strait Islander people between 50-64 years of age is the same process for assessing people aged 65 years and older. Under the *Aged Care Act 2024*, triage delegates will be required to inform people who are under 65 and seeking aged care services of alternative services that may meet their needs, prior to determining their eligibility.

A person does not need to provide proof that they are Aboriginal and Torres Strait Islander. Self-identification, or identification by a person or organisation they trust is sufficient for aged care purposes.

Important: older Aboriginal and Torres Strait Islander people may be members of the Stolen Generations and/or be impacted by displacement and social disruption and therefore may be traumatised by having to demonstrate their Indigeneity. If a person identifies as Aboriginal and Torres Strait Islander it is important for this to be documented during the assessment for eligibility, service and data collection purposes.

The Triage Delegate must also undertake the triage section of the IAT to determine the type of assessment (home support or comprehensive) for the individual.

If a person has gone through the screening process and been advised they are likely to be ineligible for the needs assessment, a flag will appear in the My Aged Care Assessor Portal. Triage Delegates should use all available information from screening, on the older person's My Aged Care Profile and provided during triage to reach their own decision regarding an individual's eligibility. Triage Delegates are ultimately responsible to make a decision about an older person's eligibility for a needs assessment.

In addition to determining the eligibility for an older person to undergo a needs assessment, Triage Delegates should also undertake the triage section of the IAT and determine the assessment type and assign to an appropriate assessor.

Under the Instrument of Delegation, Triage Delegates will also be delegated the power to decide under section 64 of the *Aged Care Act 2024* that an older person has undergone a significant change of circumstances or other change in their circumstances and requires a reassessment of their needs. The information required by Triage Delegates to confirm a reassessment will be gathered by assessors during a support plan review. During the November 2025 transition, Triage Delegates should pay special attention to any clients that are marked as unlikely to be eligible due to their age and check if their application for care was already in-progress before 1 November 2025. See section 1.5.11*Younger people* in Chapter 1.

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5.2.2. Informing the eligible younger person of other services

Triage Delegates should be aware that, if the individual is under the age of 65 and falls into one or more of the eligible cohorts, they must inform the eligible younger person of other services that may be available to meet their care needs, noting that it is not a requirement for a person under the age of 65 to take up other services in place of aged care services.

Note:

Eligible younger people who have been referred via the My Aged Care contact centre would have been informed of other services prior to agreeing to be referred for an assessment. Triage Delegates should check the older person's record to confirm whether they have been advised of other services at the Contact Centre screening stage.

If the older person advises that they do not wish to explore other options, proceed with screening as usual.

If they indicate they would like the opportunity to explore alternative support options, they can be referred to the services list below at *Figure 3*, where applicable and relevant to their local area. If they choose to pursue this pathway and do not want to be referred to an assessment organisation, screening should not continue, and the assessment can be cancelled. A Notice of Decision does not need to be issued as the application has been withdrawn.

Aboriginal and/or Torres Strait Islander

- Elder Care Program
- Care finder – only when an Elder Care support worker is not available to them
- National Disability Insurance Scheme (NDIS) – If the person is a NDIS participant and seeking access to residential aged care
- Disability Gateway – If the person is not a NDIS participant and seeking services to residential aged care
- Local councils
- Independent living centres
- Non government-funded providers

Homeless or at risk of Homelessness

- National Disability Insurance Scheme (NDIS) – If the person is a NDIS participant and seeking access to residential aged care
- Disability Gateway – If the person is not a NDIS participant and seeking services to residential aged care
- Local councils
- Independent living centres
- Non government-funded providers
- Services Australia – offers housing programs

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Figure 3 – list of alternative options for the eligible younger person to consider

5.3. Conducting triage

Prior to calling the older person to conduct triage, Triage Delegates should:

- Review the older person's My Aged Care record
- Note the older person's preferences, choices, any additional needs and communication preferences that will need to be accommodated during the assessment process (e.g. when a hearing impairment is identified or an interpreter is required)
- Note that information will be pre-populated from screening. In some circumstances, if an older person was previously found ineligible, then later is eligible, the screening information cannot be changed. The 'likely ineligible' flag will be unticked however screening information will not be able to be updated
- Where the older person has nominated a primary contact, and the triage delegate is satisfied that the older person nominated this person to be contacted in place of the older person in all instances (or the primary contact has nominated themselves because they are an appointed decision maker for assessment matters), the triage delegate can contact the nominated primary contact in the first instance. This may be to inform the primary contact that the delegate is seeking to conduct triage, what triage would involve, and to ask the primary contact to discuss the process with the older person. An older person is encouraged to be present for triage, but this is not necessary if the primary contact either:

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  - can communicate information for the older person, including in their capacity as an agent or a registered supporter, or
  - is an active, appointed decision maker for the older person and has legal authority to make decisions relevant to triage on behalf of the older person.
- If the triage delegate is contacting the older person's appointed decision maker, the triage delegate must ask them to confirm:
  - that they are acting in line with their legal authority to make decisions for the client (mandatory), and
  - if they have talked to the client about the triage and what it may involve (not mandatory, but this is in line with the principles of supported decision-making).

Note:

Registered supporters must act only within the scope of their roles. For example, the role of a registered supporter is to support the older person to make and communicate their own decisions, acting in line with the will and preferences of the older person. Triage delegates should check that a registered supporter or agent is communicating information for the older person in line with their role, not making decisions on behalf of the older person. If in doubt, the triage delegate should contact the older person.

If an active, appointed decision maker (whether or not registered as a supporter), is making a decision on behalf of an older person, triage delegates must be satisfied that the appointed decision maker is acting in line with their legal authority under a Commonwealth, state or territory arrangement, and that the authority is relevant in the circumstances.

Triage Delegates should review the proof an appointed decision maker has provided to the System Governor to support their authority. A Triage Delegate cannot rely solely on a person's registration as a supporter to assume their decision-making authority for aged care triage or assessment matters or assume that simply because a person has a supporter guardian, the older person does not have decision-making capacity some or for all matters.

Triage Delegates should also inform the appointed decision maker that it is preferred, where possible, that the older person is present on the call.

If any information or documents must be shared with an older person during the triage process, it must also be shared with certain registered supporters (supporters and supporter guardians) for an older person, in line with the Act (section 29). Information cannot be automatically shared with an older person's 'supporter lite'.

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Triage delegates must consider a referral to care finder services for a vulnerable older person who does not have anybody who can support them. Information on care finder services is available at My Aged Care. For Aboriginal and Torres Strait Islander clients, the assessor may connect the older person with an Elder Care Support worker to provide additional support to the older person.

- Help from a care finder | My Aged Care

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5.3.1. Initial discussion

When contacting the older person and/or nominated contact, triage delegates should:

- Identify who you are and the organisation you are from and confirm that they have 15 to 20 minutes to discuss their assessment request.
- Complete an identity check and confirm whether there is anyone else with the older person at the time (e.g., registered supporters). If they do not have anyone with them and would like someone with them, call back at a more suitable time.
- Advice you have received the referral, who it is from and the role your organisation plays.
- Advise you will be asking a few questions relating to their general health and wellbeing to help inform assessment needs.
- Confirm consent (consistent with section 5.1) and ensure the older person understands why they are having the assessment, why the assessor needs to come to their home (if applicable) and allay any concerns or fears that they may have about the assessment. Should the older person or their active, appointed decision maker choose not to give consent, the triage process is to end and the assessment referral is rejected.
- Confirm their preference for an Aboriginal and Torres Strait Islander assessment organisation (see below this section for further detail)
- Check the contact information for the older person, and if appropriate, the contact information for the registered supporter or agent, such as a care finder (including address for receiving correspondence) to ensure it is complete, correct and validated.
- Gather any additional information required, including whether the older person would like someone who supports them/registered supporter/agent present for the triage questions asked using the Integrated Assessment Tool or at the assessment.
    - If an older person lacks decision-making capacity, an active, appointed decision maker (whether or not a registered supporter) must be involved in the assessment to ensure the older person is accurately assessed. An active, appointed decision maker for this purpose may already be identified on the older person's record as a person to whom all correspondence must be sent. Triage Delegates should review the proof an appointed decision maker has provided to the System Governor to support their authority. Registered supporters who are not active, appointed decision makers can also be involved, in line with the will and preferences of the older person. The assessor can submit a request to create a new registered supporter/agent relationship if required (see Chapter 3).
    - Submitting a 'request' may mean a supporter relationship is recorded in the system as a pending relationship seeking to be registered by the System Governor. There are many ways to submit a request, including with the help of an assessor, online, by calling My Aged Care, or using a printed registration form. More information on the registration pathways will be available from 1 November at: www.myagedcare.gov.au/registering-supporter.
    - A person who is seeking to become a registered supporter who is also an active, appointed decision maker must provide proof to show they are an active, appointed decision maker for the older person. This is likely to be legal documentation. Medical evidence may also be required to establish the older person's loss of decision-making capacity.
- Organise an interpreter if required (e.g., for interpreting services or Auslan) and ensure other necessary supports are in place for the assessment.

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- Acknowledge that multiple contacts with older Aboriginal and Torres Strait Islander people may be required to build trust and rapport but this should not compromise on older people being able to access timely aged care services.

Note: An interpreter may need to be pre-booked, so early action on interpreter arrangements will assist meeting timeliness measures.

- There are several support networks that the triage delegate can refer to for older people who are more vulnerable or hesitant to participate. These include:
  - Home - OPAN
  - Support for older culturally and linguistically diverse people | My Aged Care
  - Getting support in aged care | My Aged Care
  - Help from a care finder | My Aged Care
  - Elder Care Support | Australian Government Department of Health, Disability and Ageing
- Consider asking the older person if they have a My Health Record to help ensure their Support Plan can be linked to it (subject to their consent, as per section 5.1).

Confirming a client's preference for an Aboriginal and Torres Strait Islander assessment organisation

A client's preference for an Aboriginal and Torres Strait Islander assessment organisation, will usually be captured at registration. The client's preference will be visible on their client card.

It will need to be confirmed when completing the client's demographic details at triage.

- When a triage delegate receives a referral, they should view the client information to gain a preliminary understanding of the client's situation.
- If there is no preference listed, please record the preference after having a conversation with the older person.
  - It is important to have a conversation with the older person about their preference. It should not be assumed that all Aboriginal and Torres Strait Islander people will want their assessment with an Aboriginal and Torres Strait Islander assessment organisation.
- The client's preference will determine whether the referral is accepted, transferred or rejected.
- If a transfer is required, this will need to be managed with the support of a Team Leader.
- It will also ensure that the assessment process is responsive to the person's individual situation.

Asking triage questions using the Integrated Assessment Tool

The triage component of the IAT helps validate the appropriateness of an assessment referral and to collect information to support the assessment process. Triage delegates must refer to the IAT User Guide to ensure competency in the use of the IAT and in the delivery of high-quality triage. Triage delegates are also required to complete mandatory

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online induction training and triage delegate training before undertaking the triage component of the IAT.

See the IAT User Guide for further information.

Triage delegates will be able to choose whether information gathered at screening is pre-populated into the triage component of the IAT. Pre-populating information will help reduce the older person's need to repeat their story.

The triage component of the IAT comprises questions relating to the reason for their assessment, current access to services, function, general health and general wellbeing and safety.

When conducting triage with older Aboriginal and Torres Strait Islander clients, The Triage Delegate should exercise discretion and professional judgement on how information is solicited from clients during the Triage process. This includes ensuring that information is collected in a culturally safe manner. including the appropriate use of the IAT. A yarning approach may be employed to collect the necessary information and with consent from the older person, support persons may be present during the Triage process.

Where possible, the Triage Delegate should liaise with the client's GP, service provider and support networks to help inform the triage process. The approach allows relevant information to be gathered in advance and confirmed during triage, reducing the need for the client to repeat their story multiple times.

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Note:

For referrals for the End-of-Life Pathway, triage questions will be optional so there is flexibility to only ask questions that are appropriate to the individual.

When completing the Triage section of the IAT, the triage delegate must provide clear justification in the 'Outcome/advice for assessment notes' field to support the recommended assessment type. This justification should explain why the selected assessment type is appropriate.

At the conclusion of the triage component of the IAT, triage delegates will confirm eligibility for an assessment, the assessment type, assessment priority and whether urgent services and/or linking supports are required, in instances where these services were not provided at screening. In the case of End-of-Life Pathway referrals, if an End-of-Life Pathway Form has not already been submitted, the triage delegate should advise the older person of the steps required (e.g. downloading the form and/or visiting their GP or nurse practitioner to have the form signed).

If the Triage Delegate disagrees with the assessment type and/or priority recommendations made at the screening stage, the triage delegate will have the ability to change the recommendations.

After triage, the team leader may also transfer the older person to another assessment organisation if appropriate. The team leader should ensure the older person understands why they are being transferred, and that the receiving assessment organisation is aware that they will receive the referral.

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Note:

If the older person is deemed to be ineligible for a needs assessment, the Triage Delegate should communicate the decision and inform them how to request an assessment in the future (this can occur at a separate time to the initial phone call, if necessary).

Effective communication with the older person (and their active, appointed decision maker or registered supporter, where appropriate) on a decision to not recommend an assessment, and effective communication between assessors, assists with managing expectations and reducing complaints.

An 'Ineligible for Assessment Letter' will need to be sent to the older person (and registered supporters, as required under the Act) as notice of this decision.

Within the IAT, the Triage Delegate will be able to consider the type of assessor recommended for the older person's assessment, having regard to:

- relevant cultural background or understanding
- who has the expertise to address the diverse needs of the older person
- who is geographically closest to the older person, which helps to ensure the older person is assessed in the most efficient, effective and timely manner.

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5.3.2. Referring for urgent services and linking support at triage

Triage delegates are responsible for determining whether individuals require referrals under the Alternative Entry Pathway. This allows clients to access services prior to undergoing an assessment.

The Triage section of the IAT includes a question about an older person's need for urgent service provision, *Does the client require urgent service provision (direct to service)?* This a mandatory question and requires a *Yes* or *No* answer and details must be added to a free text box. This question is used to determine the need for urgent services via the Alternative Entry pathway. Information on issuing referrals under the Alternative Entry Pathway is included in Chapter 3.

Even if the urgent services are only required for a short period, the older person will still be required to undergo an assessment.

The triage delegate may also identify and recommend linking supports for the older person following triage, or for consideration by the assessor at assessment.

5.3.3. Triage for clients who have been referred through a Support Plan Review

In submitting a request for a reassessment following a SPR, the assessor is required to indicate whether they have spoken with the client and provide a summary of that conversation.

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- Where a conversation with the client has already occurred, the Triage Delegate should consider the conversation summary provided by the assessor as necessary.
- If satisfied, the Triage Delegate should complete the triage questions of the IAT, without needing to speak with the client, given this occurred at the SPR stage. An assessment can then be scheduled for the client at a time that aligns with their priority setting.

Note: That consent to complete IAT Triage questions should be sought by the assessor when the assessor is speaking with the client (or their registered supporter and/or appointed decision maker) at the SPR stage.

If a conversation with the client has not occurred at the SPR stage, the Triage Delegate should speak with the client to confirm a significant change has occurred, drawing on the IAT triage questions to inform response. If the Triage Delegate is satisfied a significant change has occurred, they should complete the triage questions and recommend a reassessment.

Fact sheet for Assessors and Triage Delegates on Support Plan Reviews that initiate a new assessment | Australian Government Department of Health, Disability and Ageing

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5.3.4. Conducting triage for the End-of-Life Pathway

The End-of-Life Pathway is available to participants already accessing Support at Home as well as older people who are not currently accessing services through the Support at Home program.

A participant can access one episode of the End-of-Life Pathway through the Support at Home program. An older person is eligible to access the End-of-Life Pathway if they meet the following criteria:

- a medical practitioner or nurse practitioner provides an estimated life expectancy of 3 months or less, and
- a score of 40 or less on the Australian-modified Karnofsky Performance Status (AKPS) score (mobility/frailty indicator)

Older people who are not currently accessing Support at Home, who would like to access the End-of-Life Pathway, can be referred for a high-priority aged care assessment.

The End-of-Life Pathway Form must be completed before End-of-Life Pathway can be approved. The form captures specific medical information related to the participant's medical condition and evidence of end-of-life. An appropriate medical practitioner (their GP, non-GP specialist or nurse practitioner) will complete the form.

The assessment referral will follow the same process as it does for all assessments and will be assigned by a Team Leader for triage.

All triage questions will be *optional* for the End-of-Life Pathway so there is flexibility in only asking questions that are appropriate to the individual. Questions that would be insensitive to ask during triage can be skipped.

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The End-of-Life Pathway Form does not need to be submitted for the triage delegate to complete triage and assign the assessment to an assessor. If an End-of-Life Pathway Form has not already been submitted, the triage delegate should advise the older person of the steps required (e.g. downloading the form and visiting their GP, non-GP specialist or nurse practitioner to have the form signed).

For participants seeking access to the End-of-Life Pathway who have submitted their End-of-Life Pathway Form at this stage, triage may also involve verifying this documentation.

If a Triage Delegate identifies a submitted End-of-Life Pathway Form contains a mistake or missing information, triage should still be completed and the older person should be progressed to an assessment, while keeping the form as not validated. An older person should be informed the form contains missing or mistaken information and what they need to do for the form to be fixed. Once fixed, the form can be presented for validation at assessment.

The Triage Delegate can flag a referral as End-of-Life before or after (not during) triage by clicking the 'Flag as End of Life'.

To access the End-of-Life Pathway, existing Support at Home participants can request a urgent Support Plan Review.

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5.3.5. In-hospital triage and self-referrals

For hospital assessments, in the first instance an assessor, once obtaining the older person's consent, will complete the triage questionnaire using clinical records and information that is available, in liaison with the hospital discharge team. Following triage, the assessor may recommend a high or medium priority assessment.

Where an assessment is self-referred, and the assessor is with the older person, assessors will be able to conduct triage with the older person at the same time as the assessment. For assessors who are not Triage Delegates, triage must be conducted with triage delegate oversight.

5.3.6. Recording eligibility for an assessment concerning individuals aged 50-64

When determining whether an individual aged 50-64 years is eligible for an aged care needs assessment, triage delegates should clearly record their decision and the information they relied upon to come to that decision. This should be recorded in the free text box at the end of the IAT triage section. For example, when finding someone aged between 50-64 is eligible for an assessment under the homeless/risk of homelessness provisions of the Act, the triage delegate should make specific reference to which criteria under the relevant definition applies to the individual who is seeking an assessment. Refer to section 1.2 of this Manual for the definition of homeless and risk of homelessness.

The free text box at the end of the triage section of the IAT should also be used by the triage delegate to record confirmation an individual aged under 65 has been informed of other services that may be available to meet their needs before electing to be provided funded aged care before the age of 65.

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Note:

Triage Delegates should review the 'client story' note in an older person's record to confirm if an eligible person aged 50-64 has been informed of other services that may meet their needs during screening.

5.3.7. Preparing an older person for their assessment

Triage delegates should outline to the older person what will happen at the assessment, discuss their availability for the assessment and then make the appointment. Where possible, the triage delegate should give the name of the assessor that will be undertaking the assessment.

Additionally, triage delegates should:

- Complete the Work, Health and Safety (WHS)/Home Safety Risk screen and check for alerts and notes in the referral information on the My Aged Care record. Ask relevant questions to identify work, health and safety concerns which could affect the assessment for example: "Are there any risks or hazards the Assessor needs to be aware of before attending the assessment in your home?". The team leader may already have knowledge of information that may be relevant to assessment services and assessor safety.

Note:

Special WHS requirements (such as the necessary presence of the older person's guide dog) at the assessment. Arrange other responses (such as the need for two assessors to attend the assessment due to safety concerns).

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- Upload any additional older person information to the older person record (e.g., WHS screen) and use 'Notes' to record assessment booking details. Include if relevant, with older person's consent, sensitive information in sensitive notes and attachments.

- Check to see if there are cohabitating older people in the house who may also require an assessment and refer them to My Aged Care or include a note that they may be self-referred to their assessment organisation if circumstances meet the self-referral criteria and if appropriate.

5.3.8. Preparing for an assessment with an older Aboriginal and Torres Strait Islander person

Taking note of the community the older person belongs to, can support culturally safe and appropriate assessment practices. This information may help ensure the referral is assigned to an assessor who is either from the same community or has a strong understanding of the local customs and culture context. This alignment may enhance the delivery of culturally safe, trauma aware and healing informed assessments.

In preparation for the assessment, the assessor/Triage delegate should collect as much relevant information as possible prior to the assessment. This helps to inform the process and reduces the need for the older person having to re-tell their story.

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Where consent is obtained from the older person, this may include:

- information collected by the Elder Care Support workforce
- Information from GPs or the Aboriginal Torres Strait Islander health/medical services, including results from MBS 715 health check
- Information from other health professionals, where appropriate

Once triage is finalised and the assessment assigned to an assessor, the answers to triage questions cannot be altered by an assessor. Assessors and team leaders will be able to access historical triage information on an older person's record, which includes details such as the dates of previous triage, the organisation and individual who conducted it, and the outcomes of the triage.

Where possible, Aboriginal and Torres Strait Islander people should be matched with an assessor who is match an assessor who is appropriate as per the local customs, protocols, kinship obligations and preferences of the older person. This may include the support of family members or advocates where appropriate.

Department of Health, Disability and Ageing website:

Deaf Connect (free face-to-face sign-language and Remote Video Interpreting Service)

Fact sheet for Assessors on care finders

My Aged Care website: Support for Hearing and Vision Impairment;

Help from a care finder

Department of Home Affairs website: Translating and Interpreting Service

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5.4. Revoking eligibility during an assessment

Under the *Aged Care Act 2024* there are clear age eligibility requirements to have an aged care needs assessment. See Eligibility requirements to access government funded aged care services in Chapter 1.

An individual's eligibility to undergo an assessment is determined by a triage delegate based on the information available to them when triage is conducted. The Act provides specific circumstances where an eligibility decision may be revoked on the initiative of the System Governor, including during the application process the individual gave information or documents which were false or misleading, omitted any matter or things that without would make the document false or misleading. This may include situations where key facts presented were inaccurate or misleading, resulting in the eligibility decision being granted erroneously. In such cases, it is the departmental delegate's responsibility to assess the evidence, and if warranted, initiate the revocation process to maintain the integrity of the aged care system.

If an assessor or Assessment Delegate has concerns about the information or documents provided by an older person and/or their registered supporter(s) or appointed decision makers, they should contact their Assessment organisation's Operational Manager, who will make contact with the relevant area of the Department to resolve.

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For further information on revocations on the initiative of the System Governor and individual, please refer to Chapter 11 – Reviewable Decisions, Revocations and Complaints.

5.5. Assessment settings

5.5.1. Usual accommodation setting

The initial assessment should be face-to-face in the older person's usual accommodation setting. This will assist with the environmental, physical, and social components of the assessment by observing the older person's level of independence, functioning, and existing support arrangements in familiar surroundings. Due to the nature of transition care services, some assessments will occur in the hospital setting.

However, if this is not possible, assessments for Aboriginal and Torres Strait Islander people should be undertaken at a setting that makes the older person feel safe, at ease and comfortable.

5.5.2. Telehealth

It is best practice for assessments to be conducted face-to-face. Assessment organisations are strongly encouraged to ensure assessments are face-to-face wherever possible. Where face-to-face contact between the assessor and older person is not possible (e.g., when assessing an older person in a remote area or the older person is inaccessible due to exceptional circumstances such as a seasonal weather event), a telehealth assessment may be undertaken. The assessor must make additional efforts to ensure the quality of assessment is not compromised when conducting a telehealth assessment and that assessment decisions remain evidence based.

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Another suitably qualified person (such as a local health worker) and/or the older person's agent, registered supporter or appointed decision maker may attend the assessment with the older person to assist the assessment process. If a local health worker or provider is involved, and with consent from the older person, the assessor may, work with these individuals prior to an assessment to attain relevant information that can help inform the assessment process.

5.5.3. Remote setting

Assessors should use the remote assessment indicator in the My Aged Care assessor portal to indicate if an assessment has been or will be conducted in a remote area. This indicator can be checked before starting an assessment, when uploading from the Aged Care Assessor App or on finalisation of an older person's Support Plan.

The Department uses the Modified Monash Model (MMM) as the classification system to define geographical remoteness. The remote assessment flag should only be selected where a face-to-face assessment is undertaken in a remote (MM6) or very remote (MM7) area. You can check the MMM classification by entering their address in the department's Health Workforce Locator.

My Aged Care – Assessor Portal User Guide 6 – Completing an assessment

5.5.4. Hospital setting

Assessments in a hospital setting are typically conducted by a clinical assessor.

For those older people in hospital requiring an assessment, they should be assessed in the same way as those assessed at home, utilising the IAT to ensure a nationally consistent approach to assessment of aged care needs, including consideration of the home environment and social issues. An older person needs to be in a stable condition for a hospital-based assessment to take place (unless a rapidly deteriorating condition makes this impossible). Being medically stable ensures that the care needs of the older person outside of the hospital can be accurately assessed and the most appropriate care services recommended.

In hospital assessments, the assessor must ensure that a carer or other advocate is advised of the assessment in all circumstances and should be present during an assessment where possible.

Approvals for all types of care can be made following an assessment in a hospital environment (e.g. an assessor can recommend for Assessment Delegate to approve CHSP). There should be no presumption that older people will progress from hospital to residential care, as they may be able to return to their previous living arrangements. This is especially appropriate following an acute incident where the individual may benefit from a reassessment in the home environment after the acute phase.

Assessors need to be aware that for an older person to be approved for TCP, the assessment must be conducted while the person is in hospital. Assessors should also consider arranging an assessment for Support at Home or CHSP when the older person is discharged from a hospital and returns to their usual accommodation setting. This allows a more accurate picture of care needs in the home setting and ensures the older person's current needs and goals are being assessed.

Assessors should be aware that a person in hospital cannot be approved for the Restorative Care Pathway or a period of reablement.

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5.6. Commencing the Assessment

Assessors are required to do the following prior to attending the assessment:

- After the referral has been assigned to the assessor, the assessor must review all information in the older person's record.
- With the older person's consent, consider the collection of information on the older person's situation and medical conditions diagnosed by suitably qualified medical personnel that may be required prior to the assessment. Contact the referrer or health professional if indicated prior to the assessment.
- Note and manage WHS risks.
- Note the timeliness measure for completion of the assessment process.
- Determine whether a cultural broker, interpreter, care finder, elder care support worker or advocate (through OPAN for example) needs to be included in the assessment.
- Gather any anticipated forms or resources, including providing copies of relevant My Aged Care booklets and/or brochures depending on the type of assessment to be conducted.
- Review *Best practice tools and tips for conducting the assessment* in this manual for guidance on how to achieve a conversational, respectful, and empathetic

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approach during the assessment. This will allow the assessor to develop rapport with the older person and their support network.

- Download the assessment if using Aged Care Assessor App.
- Check whether a supporter or agent for the older person has been registered or established. If the client is already registered in My Aged Care, assessors can do this by using the assessor portal to find the client, then view their support network (if any supporter relationships have been registered). Refer to Chapter 3 for information on how registered supporters must engage with the older people they support, and how they might be involved in an assessment.
- Check the authority of any active, appointed decision makers of the older person, if they have made themselves known to the assessor or My Aged Care. Appointed decision makers are not required to register as supporters to exercise their legal authority under a Commonwealth, state or territory arrangement. However, this is encouraged to streamline authentication and information sharing to support older people. Assessors can engage with active, appointed decision makers before, or without them, formally registering as supporters, provided the assessor is satisfied they are acting within their authority. To do so, assessors should seek legal documentation that shows the person is an active, appointed decision-maker for the older person and that their decision-making authority is relevant to the assessment. Medical evidence about the older person may also be required to show that the decision maker's authority is active.
- Review notes entered at triage including referrals, attached documents and previous support plans if applicable, to help familiarise yourself with the older person and their needs and limit the need for the older person to repeat their story.
- Connect with the local Aboriginal and Torres strait Islander community with their knowledge of local services and culture.

5.6.1. Confirming an older person's preference prior to the assessment

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As it is a phased rollout, Aboriginal and Torres Strait Islander people who are booked with a Single Assessment System organisation need to have the choice to transfer their assessment to an Aboriginal and Torres Strait Islander assessment organisation if one commences in their area.

Preferences for an Aboriginal and Torres Strait Islander assessment organisation should be uncovered during the assessor's pre-assessment planning. This allows the assessor time to contact the client, discuss their preference and organise transferring the client prior to the assessment commencing.

- This must occur **prior to the assessment**. Once the assessor starts the assessment, it will need to be cancelled it they are not proceeding with the assessment. The general recommendation would be that the assessor with the booking continues with the assessment as planned, **with the agreement of the client.**
- The client's **condition needs to be taken into consideration**, that their health condition and care needs would not be adversely impacted by a delay in assessment if they were to be referred to another organisation.
- A conversation with the client **prior to the assessment** is recommended to ensure that they have choice and control and the ability to make decisions regarding their care.

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- If the client's preference is to be assessed by the Aboriginal and Torres Strait Islander assessment organisation; and they understand the timing impacts; then the assessor can ensure a warm referral as per the processes in the My Aged Care assessor manual.
- A new rejection reason 'client prefers a FNAO' is available in the IT system. An older Aboriginal and Torres Strait Islander person should not be rejected based on a client's preference unless it is a last resort. A transfer prior to the assessment is preferable to a rejection.
- If the referral is cancelled by the assessor at the point of assessment, this may slow down the process for the client which is not the desired outcome.

This above process also applies to Support Plan Reviews, and subsequent new assessments.

At the time of the assessment, the assessor must:

- Be clear to the older person who you are and the organisation you are from and outline your role as an assessor on behalf of My Aged Care.
- Wear the My Aged Care badge or ID according to assessor branding protocols and style guide.
- Inform the older person of the assessment process and potential outcomes,
- Conduct a wallet check:
    - explain to the older person why you need to do this
    - sight two valid identity documents
    - if the wallet check has been attempted but the older person is unable to produce two valid identity documents or has indicated they will provide documents at a later point, enter this information as a note in the older person record as evidence of attempting the wallet check
    - record the results on the older person's record.
- Confirm that the older person understands the role of the assessor and the assessment process and obtain the older person's (or active, appointed decision maker's consent (whether or not they are a registered supporter) before commencing the assessment. Explain to the older person that the assessment has now commenced as they have provided consent, and
- Confirm the identity of other people supporting the older person at the assessment, including the status of registered supporter and agent relationships
- Submit requests to register supporters/agents as required and when practical, ensure any supporting documentation is uploaded, including legal documentation and medical evidence if required.
- If the assessor is an Enrolled Nurse conducting a comprehensive assessment, they must be under direct or indirect Registered Nurse supervision within the same organisation.

Note:
The older person can withdraw their consent at any time. In this case the assessment is discontinued.

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5.6.2. Wallet check

A wallet check assists to verify the older person's identity and reduce the risk of duplicate records. Whoever has the first face-to-face contact with the older person following the creation of the older person's record (e.g., an assessor or service provider) is expected to sight two types of valid older person identification and record this information on the older person record. The My Aged Care assessor portal provides a list of types of identification that can be used for the wallet check.

The wallet check only needs to occur once. If a reassessment is being conducted for an older person who has previously had a wallet check it is best practice for the assessor to check the older person's identification and confirm their details have not changed. Where possible assessors should use the wallet check as an opportunity to confirm an individual's age provided at screening or triage matches the age on their identification. If there are concerns that an individual does not meet the age eligibility requirement or one of the exceptions to undergo an assessment based on identification cited during a wallet check, the department should be contacted.

Note:

The wallet check can be conducted at any stage of the registration or assessment process and through the Aged Care Assessor App.

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5.6.3. Registering a supporter

Registered supporters help older people to make and communicate their own decisions about aged care. A registered supporter can request and receive information about an older person's aged care, help them to understand information and make their own decisions, and let people like My Aged Care and aged care providers know what the older person's decisions are.

The registered supporter role will replace existing regular and authorised representative relationships in My Aged Care. Older people with regular and authorised representative relationships active in My Aged Care on 31 October 2025, who did not opt out, will move into supporter relationships on 1 November 2025. If the older person or their supporters did not want to transition to a supporter relationship and did not opt out by 31 October, they can still request to end their supporter relationship at any time from 1 November 2025 in their Online Account or by calling My Aged Care.

During an assessment an older person and/or their prospective supporter can request to register a supporter relationship by:

- completing the Registration of a Supporter form. The assessor can upload the form and any associated documentation to the client's record. **Note:** a registration form may also be generated following the completion on the online registration form through the My Aged Care website. This will look different to the Registration of a Supporter form but should have all the same information. Assessors should treat it the same as the Registration of a Supporter form.
- submitting a registration request online with the assessor via the assessor portal or app, including uploading any associated documentation. If necessary, the Aged Care Assessor App camera can take a photo of the document to upload as an attachment as long as the document photographs are clear and readable.

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A completed registration form and any associated documentation can be uploaded to the client's record. The prospective supporter can also mail a copy of the documents to the My Aged Care contact centre, and the assessor can write a note in the older person's record of this undertaking (see Appendix C. Contact Details).

Note:

Updated consent scripting and declarations for the registration of a supporter must be used by assessors if they are assisting an older person or prospective supporter through the registration process. These will be available on the Assessor Portal or App, and the printed registration form from 1 November 2025.

It is important to note that while assessors can collect and submit the required information, they may not be able to confirm or approve the registration of a supporter relationship, depending on the circumstances. For example, some applications must be escalated to the departmental team responsible for supporters to consider before a decision to register can be made. This includes applications:

- where the prospective supporter has declared a conflict of interest
- where there is anything to suggest the prospective supporter cannot comply with the duties of a supporter (e.g., the prospective supporter had a previous registered supporter relationship cancelled), or
- where the prospective supporter is also an appointed decision maker and must provide additional documentation like legal and medical evidence.

From 1 November 2025, the My Aged Care website will include information on the various ways a person can request to register, or become, a supporter. You can access this information at www.myagedcare.gov.au/registering-supporter.

If, in submitting a request to register a supporter who is also an appointed decision maker for the older person, proof of legal decision-making authority cannot be obtained, advise the pending registered supporter to provide the required proof, including any legal or medical documentation to the delegate team responsible for registered supporters. This team will process the documents and if validated, register the relationship.

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5.7. Undertaking an assessment using the Integrated Assessment Tool

The assessment starts with getting the older person's consent. Consent from the older person, or their active, appointed decision maker is recorded on the IAT.

The IAT is an assessment tool that has been designed to support skilled assessors to determine a client's aged care needs. It comprises questions across social, physical, medical, cognitive, and psychological domains as well as home and personal safety, risk of vulnerability and support considerations.

The assessment component of the IAT is divided into twelve sections. Some sections of the IAT contain nested questions to tailor assessments, only diving deeper into areas where needed. This means that some question sets or validated tools in the IAT will only display to the assessor if certain answers are selected to the question directly proceeding

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it. The IAT integrates eleven validated tools directly into the assessment process, enhancing the depth and clinical relevance of the assessment.

Assessors may wish to use assessment tools not included in the Validated Assessment Tools within the IAT to enhance assessment and strengthen objective evidence for an assessment recommendation(s). This is at the discretion of the assessment organisation. Each assessment organisation is responsible for providing their assessment staff with training on how to use these tools. General information about each tool is provided in assessor induction training but additional training is recommended to make sure each assessor understands the results from each validated tool.

The IAT includes decision support rules to assist assessors to make recommendations for the type of support an older person requires based on the older person's responses to relevant questions.

In completing the IAT, the assessment information should include:

- evidence that the assessor has explored the older person's own supports and/or non-funded services (e.g., state and local government programs, private services) as options to help maintain their independence.
- evidence of supporting an older person's communication or support person needs.
- a completed 'Support Considerations' section to demonstrate an understanding of what is important for the older person in regard to how support is provided, such as the below list (note some of these may be sensitive topics):
    - any cultural and/or religious values and beliefs
    - gender identity or sexual orientation/sexuality or experience of discrimination
    - history of childhood experiences
    - Life experiences including traumatic events and associated triggers
    - other relevant information relating to parole conditions or other information that should be sensitively discussed with the older person when developing the Support Plan and that providers should be aware of.

The IAT User Guide provides assessors with further advice about each question in the IAT and possible answers. Assessors must refer to the IAT User Guide to ensure accuracy in the use of the IAT and in the delivery of high-quality assessments.

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All mandatory questions must be completed, and it is best practice that the older person's concerns and goals are added before finalising the IAT. The assessor then selects 'Finalise IAT' before moving to the support plan. This is so the system can recommend a home support classification (also referred to as a classification level under the Act), which may be a Support at Home classification or CHSP. Note that a classification level recommendation must be made for people who choose to access services through the MPSP or NATISFACP.

If the IAT has not been finalised, the IAT outcome and classifications will not be displayed. The assessor will not be able to recommend the person for funded aged care services.

Aboriginal and Torres Strait Islander assessment organisations will be required to use the IAT to conduct assessments and must do so in a way that is culturally safe for the region or older person. Assessors may conduct the assessment without a device. In such cases, the assessor should upload the information into the IAT when the assessment is completed. Assessors may also be able to make inferences from the yarn to complete the IAT.

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Use the validated culturally appropriate assessment tools as needed (see the IAT User Guide for more information).

Note:

For End-of-Life Pathway assessments, only mandatory questions that are required to run the IAT Outcome and generate a classification are required to be completed. This is to ensure the older person has a valid classification to return to if they need services beyond the End-of-Life Pathway funding period. Other questions are optional based on the individual's needs and context.

Important:

Under Support at Home, individuals who are care leavers are eligible for a care management supplement which will be credited to their provider's care management account.

To identify individuals who are eligible for a care management supplement during the assessment, assessors must use the diversity fields in the IAT, which do not currently capture care leavers.

Assessors who have identified individuals who are care leavers during the assessment should select the diversity field 'a person separated from your parents or children by forced adoption or removal'.

This will ensure Services Australia is able to identify these individuals from the assessment and apply a care management supplement to their provider's care management account. Refer to the Support at Home Program Manual for more information on care management supplements

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IAT User Guide

5.7.1. Clinical attendance

All sections of the IAT will be visible to both clinical and non-clinical assessors.

Where an assessment is initiated as a home support assessment by a non-clinical assessor and questions are triggered that require clinical judgement (referred to as clinical questions), the non-clinical assessor must arrange for the attendance of a clinical assessor to be involved in asking the clinical questions in the IAT. This process is known as clinical attendance and is supported by an assessment organisation's Clinical Governance Framework (see Appendix D for guidance) and standard operating procedures. This process helps to make it easier for an older person to have their needs fully assessed without delaying their assessment or having to be transferred between assessors. The clinical attendance process is outlined in detail below.

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Clinical attendance in practice

When a non-clinical assessor triggers clinical questions in the IAT, a warning message in the My Aged Care Assessor Portal or Aged Care Assessor App will prompt the assessor to complete the section in accordance with their organisation's clinical governance framework. If the assessor is using the IAT offline form, the clinical questions are colour coded in light pink.

Where clinical questions are triggered, the assessor must seek clinical attendance to ask the clinical questions (listed at Appendix E). Clinical attendance will need to be sought from a staff member who is assigned a clinical assessor role in the My Aged Care Assessor Portal. The ways in which clinical attendance can occur are detailed in the Table below and presented as tiers. Tier 1 is considered best practice; it is expected that an assessment organisation will adopt Tier 1 clinical attendance in the majority of cases.

Note:

Enrolled Nurses (EN) who hold the clinical assessor role cannot provide clinical

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For case studies of how clinical attendance will work in practice please see Appendix E.

Table 20. Clinical attendance procedure

Tier 1	A clinical assessor who holds a clinical assessor role in the My Aged Care Assessor Portal is available by video or phone call at the time the assessment is taking place to be involved in asking the clinical questions with the non-clinical assessor to the older person being assessed. A video call is preferable. The assessor can receive a call back when a clinical assessor becomes available. The assessment should continue while waiting for the callback. In this instance, if the assessor is using the IAT in the Assessor Portal or the Aged Care Assessor App, it is advised the assessor selects 'no' to the declaration. The assessor can revisit the question/s once a clinical assessor is in attendance. As the assessor continues through the IAT, they will need to make note of any other clinical questions (see appendix E) and ensure that these questions are answered with a clinical assessor in attendance. There may be situations where it is not appropriate for the assessor to continue with the assessment, even with virtual, clinical attendance. This will be determined using the following criteria:

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	• It is not physically or psychologically safe for the older person to continue the assessment, • It is not physically or psychologically safe for the assessor to continue the assessment, • The older person's condition requires a clinical assessor to undertake an end-to-end assessment Where it is considered inappropriate to continue, the assessment will end and a team leader will reassign the incomplete assessment to a clinical assessor to undertake.
Tier 2	There may be circumstances where real-time clinical attendance is not possible. If a clinical assessor cannot be contacted at the time the assessment is taking place, the assessor will complete the questions that do not require clinical judgement. All other clinical questions are noted and cannot be asked. In this instance, if the assessor is using the IAT in the Assessor Portal or the Aged Care Assessor App, it is advised the assessor selects 'no' to the declaration. The assessor can revisit the question/s once a clinical assessor is in attendance. As the assessor continues through the IAT, they will need to make note of the clinical questions prompted (see appendix E) and ensure that these questions are answered with a clinical assessor in attendance. The assessment will end once the assessor has completed the non-clinical questions in the IAT (noting the IAT itself will remain incomplete). The assessor will need to speak with a clinical assessor in their organisation about the assessment and the clinical questions. If it is appropriate for the clinical questions to be asked by a clinical assessor over the phone, arrangements will be made with the older person and relevant support people for this to take place. It is preferable the original, non-clinical assessor is also on the call. If the clinical components are completed over the phone by a clinical assessor, the assessment does not need to be reassigned to this assessor. It may be determined that the assessment should be reassigned to a clinical assessor to complete the assessment, either in person or over the phone. This may be required because: • multiple clinical questions are triggered in the IAT,

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- the needs of the older person are best assessed in person to ensure a high-quality assessment.

Where an in-person assessment with a clinical assessor is required, a team leader will reassign the assessment to a clinical assessor.

If the clinical process is initiated the assessor must:

- ensure the older person understands that there are questions in the assessment tool that need to be asked with a clinically qualified assessor so that they can apply clinical knowledge and judgment to ensure that the older person's needs are assessed in full and with their safety and wellbeing in mind. This should occur before the clinical assessor is contacted.
- include the older person in the initial discussion when the clinical assessor is being briefed on the older person's situation. The older person and/or their support person should be given the opportunity to describe their circumstances if they feel comfortable to do so.
- ensure the camera is on at both ends so that older person can see the clinical assessor if the clinical assessor is called in on a video enabled device.
- ensure the call is on speaker phone so that the older person and clinical assessor can speak directly to one another, if the clinical assessor is called on a phone without video functionality.
- explain to the older person that a follow-up phone call will be necessary to complete their assessment, if real-time clinical attendance is not possible.

If a follow-up call is necessary:

- the original non-clinical assessor should be present on the phone call to ensure there is continuity of contact with the original assessor.
- it is important that the non-clinical assessor keeps the older person, their primary contact and/or support person up to date on when the follow up phone call will take place.

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5.7.2. Tools and techniques for assessing an older person's needs

The table below details best practice tools and techniques for undertaking aged care needs assessments.

Table 21. Aged care needs assessment best practice tools and techniques

Use the Aged Care Assessment Quality Framework	• Use the four quality goals, personal, effective, connected and safe in your assessment practice.
Use a conversational approach when	• Use a conversational approach when asking questions, rather than simply running through the assessment questions and ticking boxes. Ensure your conversation is undertaken in a manner that is respectful, non-judgmental, and non-confrontational.

interacting with the older person	• Know when and how to best use closed, open, direct, and indirect questioning. • Use motivational interviewing techniques such as expressing empathy and eliciting self-motivational statements. • Use active listening skills. • Make eye contact to help engage the older person in the assessment process, unless it is culturally inappropriate to do so. For example, some Aboriginal and Torres Strait Islander people may consider direct eye contacts disrespectful or uncomfortable, but others may be more comfortable with Western norms of communicationIf using a computer at the older person's home, ensure you are not focused on just the computer. • Gauge the older person's level of engagement in the assessment. Look for signs of fatigue or discomfort and adjust approach accordingly. For Aboriginal and Torres Strait Islander clients • observe the local cultures and customs when conducting the assessment. • start with a social yarn to build rapport and trust. Share stories or other topics of common interest. • Take a whole-of-person approach to the discussion – understanding what motivates a person and contributes to their wellbeing – spiritual, emotional, and physical. • Explain to the client that if they feel uncomfortable during the assessment, it will be paused and rescheduled to ensure their wellbeing. Allow for multiple visits, if required, to build trust and develop a relationship between the assessor and the older person • welcome the presence of the older person's family member or advocate to be part of the meetings • take a less formal, yarning approach to aged care assessment.
Use appropriate language when speaking with the older person	• Use needs-focused language, explaining what could be short-term vs. long-term options to meet their needs. • Use language that is positive and not dismissive. If necessary, potentially sensitive topics (such as lack of service availability or older person fees) can be introduced at the appropriate place during the assessment process after the older person's areas of concern and goals have been identified, and when support options are being explored in the Support Plan stage. • Use language that focuses on the older person's strengths, abilities and what they want to achieve and how these could be further supported – a focus on independence. • Take the time to explain what will happen • Use informal and the local language where possible and avoid jargon • Adjust language as needed to ensure sensitivity towards End-of-Life Pathway participants (for example, focusing on more immediate needs rather than longer-term goals).

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	• Reflect the conversation back to the older person to ensure you have understood what was said and agreed on.
Interpreters or support person	• where the older person prefers to communicate in a language other than English or has indicated in their record that a support person is required, an interpreter or support person must attend the assessment (either in-person or via phone).
Supporting people with dementia and other cognitive impairments	• Use simplified language where appropriate. • Repeat questions and information where needed • Be attuned to non-verbal signs that the person may need further information to help them understand. • Seek discrete responses to questions (e.g. 'Yes' or 'No', or choices between two options) rather than multiple options. • Provide ample time for a person to respond to questions.
Using Validated Assessment Tools	Assessors may wish to use assessment tools not included in the Validated Assessment tools within the IAT to enhance assessment and strengthen objective evidence for an assessment recommendation(s). This is at the discretion of the assessment organisation. Clinical assessors should use their clinical judgement to determine if it is appropriate to use other Validated Assessment Tools. If other tools are used, the assessor should make a note of this in their assessment summary.
Observing functional activities	Where possible, assessors must observe the older person's activities to gain insight beyond information that is conveyed just verbally by the older person, a registered supporter or anyone else who supports the older person. Therefore, collect information through additional means: • ask the older person to ***show you*** how tasks are completed in the home and ***observe*** the older person undertaking those tasks (this is an 'active' assessment) and • advise the older person ***what*** you have observed/seen during the task.

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5.7.3. Aboriginal and Torres Strait Islander assessments

Older Aboriginal and Torres Strait Islander people have strongly indicated long wait times for an assessment are a significant concern. To support timely access to services, assessors are encouraged to use their professional judgement to determine when an

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assessment can be completed in one session or, be split over a few sessions without disadvantaging the client from receiving timely services.

By starting the assessment with a yarn, the assessor should be able to gauge whether it is appropriate to proceed with completing the assessment during the session.

Where an assessment cannot be finalised during the initial session and additional sittings are required, the assessors should complete the initial yarn and schedule a follow up assessment. The subsequent sessions should be conducted as soon as practicable, as service referrals cannot proceed until the assessment is completed, and in the case of comprehensive assessments, the Support Plan has been approved by the Delegate.

While the assessment remains open, the assessment organisation is required to maintain regular check ins with the client to ensure their circumstances have not changed. This ongoing engagement helps ensure the assessment remains accurate and responsive to the older person's needs.

Factors to consider in determining whether to complete the assessment tool on the first visit include:

- **Support from Elder Care Support worker**: Has an Elder Care Support worker facilitated the older person's entry into the aged care system, explained the assessment process, and help built trust in engaging with aged care?
- **Client Engagement and Readiness:** Are the client's body language and verbal cues non-responsive, suggesting they need more time to become familiar with the concept of aged care assessments?
- **Availability of Information:** Has sufficient information been collected from various sources to allow assessment to be undertaken in one sitting?
- **Supportive Environment**: Are family and/or community members present and helping to create a safe and non-stressful environment for the assessment?

If an assessor determines that an assessment should be conducted over multiple sittings, the assessor should conclude the yarning session within a reasonable timeframe.

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5.7.4. Assessors referring clients for urgent CHSP services

Note:

Information collected through the IAT to that point will be lost once the assessment is cancelled, so the IAT assessment conducted so far should be printed out from the "client's assessment history" tab prior to cancelling the assessment. A new "high priority" assessment can then be self-referred for the client.

If the assessor identifies, at a check in that the older person's circumstances have changed and there is a significant risk of harm if aged care services are not provided to the person immediately, the assessor may cancel the assessment and refer the person for urgent services.

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5.7.5. Recording assessment information

Assessors should make sure all important assessment information is recorded before leaving the assessment. The assessment information in the IAT should be transparent, objective, accurate, complete and in plain language.

Before an assessment is finalised, assessors should perform a quality check on the assessment information, expanding on information and assessment evidence where required. Accurate recording of assessment information prevents unnecessary follow-up queries and makes it more easily readable and usable for people who need to access it in the future. Once the IAT is finalised, it will become read-only and cannot be edited.

The accurate recording of assessment information (see the Aged Care Assessment Quality Framework):

- lays the foundation for creating the Support Plan for the older person and is reflective of what the older person actually said, showed or was observed doing
- minimises duplication between the assessment and Support Plan
- provides sufficient evidence for assessment delegate decision
- is required for audit purposes
- helps to inform an older person's provision of care and highlights important information or risks about the older person's situation that needs to be managed by the care provider or other parties.
- puts the older person at the centre of the Support Plan

Depending on the risk and issues highlighted in the assessment, the assessor must decide where to record the information in the older person's record, e.g., in the IAT, the Support Plan, in Notes, as attachments or as sensitive notes or sensitive attachments.

Assessment information and evidence should include all relevant documentation that supports the recommendations and decisions made throughout the assessment process. All documents must be submitted in PDF format. The assessment documentation must include:

- Consent
- IAT and Validated Assessment Tools (VATs)
- Additional Evidence
- Support Plan and Recommendations
- Notice of Decision letter
- Referral Information

The assessment should contain comprehensive information to support the justification of the assessor's recommendation for funded aged care approvals.

Recording sensitive information

If the older person shares (or the assessor is in receipt of) sensitive information, with the older person's consent this can be recorded by adding a sensitive note and/or a sensitive attachment on the older person's record. This information will not display to providers or to older persons viewing their information through the My Aged Care Online Account and will be visible only to assessors and contact centre/ACSO staff.

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Sensitive notes should be used to record information that is of importance. This may include information about:

- financial issues
- safety concerns
- health issues
- legal situations
- past experiences of trauma

For example, a sensitive note could be used to record a personal safety issue such as conflict between family members causing the older person to be anxious.

Note:

Assessors must follow their reporting obligation specified in relevant legislation and protocols in their state or territory where they identify an older person is at risk of elder abuse.

Sensitive notes and attachments are not visible through the My Aged Care Service and Support portal. Instead, a message will display on the older person's record stating "the older person has a sensitive note/attachment on their record".

Given the assessor may be best placed to discuss the sensitive issues with the provider/s, the provider could contact the assessment organisation for enquiries on notes and/or attachments. The provider may also contact the assessor directly if they have a question concerning sensitive attachments. Sensitive information may be disclosed to the provider if it is relevant to their particular service. For example, where it is recorded that an older person has a sensitive health issue, an assessor may be contacted by a garden maintenance provider and the assessor may consider it inappropriate to disclose the information; whereas if the assessor is contacted by a personal care provider, the assessor may have a duty of care to disclose the information as it has implications for the service being delivered.

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Where an existing older person currently receiving services has received a reassessment, and has disclosed new information that is categorised and recorded as a 'sensitive' note (that may impact the safety and welfare of the older person, staff or other older people), the assessor should contact the provider/s to make them aware of the sensitive information and enable them to make a risk-determination of how best to support the older person for the safe delivery of services (see section 12.11.4 older people who are in prison).

Sensitive user flag

The My Aged Care system also enables an older person or registered supporter to be flagged as a 'sensitive user' if the older person or registered supporter requests to limit access to their information, AND the older person or registered supporter:

- works for My Aged Care or the department
- has a conflict of interest with My Aged Care staff, or
- has provided reasonable justification to support that their identity and contact information is to be protected.

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An older person or their registered supporter may request that the older person or the registered supporter is made a 'sensitive user' through the My Aged Care contact centre. The request will be assessed by contact centre team leaders and if appropriate the older person or registered supporter's record will be flagged as a 'sensitive user' record.

The details of a 'sensitive user' will remain available to assessors and service providers who are working with the older person. Older people or registered supporters who are flagged as a 'sensitive user' will need to disclose this status to the contact centre at the time of their interaction, as the information is restricted and will require a team leader to access and edit the record.

My Aged Care – Assessor Portal User Guide 4 – Navigating and updating the older person record

5.7.6. Urgent service provision in the IAT

The IAT includes a new question about an older person's need for urgent service provision, "Does the client require urgent service provision?" This a mandatory question and requires a Yes or No answer. The response to this question is one of multiple factors used by the system to calculate a priority category for the person for the Support at Home Priority System. Other information is also used to calculate a priority category. An older person's priority for ongoing funding is based on their personal circumstances and characteristics.

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An older person can be determined to need urgent service provision if the older person:

- is considered at urgent and immediate risk in terms of their personal safety; and/or
- is at immediate risk of admission into residential care; and/or
- has a carer, and the carer arrangements are unsustainable, or the carer is at crisis point

The guide below has been developed to help assessors determine whether an older person requires urgent service provision.

Table 22. Urgent service provision guide

	Carer arrangements are unsustainable	Older person is at immediate Risk due to personal safety	Immediate risk of admission into residential care
	Indicators that a carer arrangement is unsustainable:	Some indicators of a person being at urgent and immediate risk with respect to their	There is an immediate risk of the older person entering Residential Care due to:

	Carer arrangements are unsustainable	Older person is at immediate Risk due to personal safety	Immediate risk of admission into residential care
Criteria for determining urgency	• Carer in crisis • Carer may have a dual caring role. • Carer's employment is being jeopardised by their caring duties • Carer may be returning to full time employment. • The level of care required by the older person is increasingly more complex and the primary carer is unable to provide the level of assistance required. • Recent changes in the older people' family, cultural, housing or social situation resulting in trauma, or feeling unsafe (including culturally unsafe) The carer in crisis is no longer able to provide care due to: • A change in the carer's personal circumstance i.e. death/significant decline in carers own health status • An inability to sustain their caring role due to a lack of	personal safety may include, but are not limited to: • Neglect of basic needs i.e., unable to access or prepare food resulting in malnutrition, weight loss or dehydration • Inadequate personal hygiene such as severe neglect of personal care leading to serious hygiene issues, infections or injuries. • Repeated hospital admissions due to frequent falls with sustained injuries. • Failure to administer necessary medications/treatments and/or attend medical appointments. For example, medication mishaps with potential for adverse outcomes. • Severe cognitive impairments with client engaging in risky behaviours (e.g. wandering) • Person is unable to safely navigate their home and community due to insufficient aids, equipment and/or home modifications. • Recent changes in the older person's family, cultural, housing or social situation resulting in trauma, or	• carer in crisis and/or inability of carer to offer required support; or • Lack of access to services to meet the older persons' needs and fairly mitigate immediacy of risk to personal safety • If the older person had access to these services (as soon as possible), they could be managed at home.

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	Carer arrangements are unsustainable	Older person is at immediate Risk due to personal safety	Immediate risk of admission into residential care
	assistance being received i.e. the older person has significant needs and no (or minimal) support is being provided. **NOTE**: Carer in crisis is different to caregiver stress. Caregiver stress is a condition of exhaustion, anger, or guilt that results from unrelieved caring for a chronically ill dependent. The stress can vary depending on the individual and generally does not prohibit the carer from providing care. Caregiver stress can be reduced by accessing respite care.	feeling unsafe (including culturally unsafe)	

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Adding concerns and goals

It is important to identify the goals the older person wants to achieve that are associated with the areas of concern that the older person wishes to address. The goals note the older person's strengths and abilities, the domain the goal(s) relate to, their area of difficulty and level of motivation to achieve the goal. The recommendations represent the agreed strategies and support to achieve goals. It is recommended that goals are added under 'Client concerns and goals' on the *Goals & recommendations* tab before accepting or overriding the IAT outcome.

After completing all relevant domains and categories in the IAT (noting that, once the IAT is finalised, answers in the IAT become read-only), the assessor and older person identify the goals the older person wants to achieve that are associated with the areas of concern that the older person wishes to address.

The goals should reflect the older person's current strengths, abilities, and areas of difficulty, along with the relevant domain and their level of motivation to achieve each goal. Recommendations must outline the agreed strategies and supports to help achieve these goals. Historical content from previous Support Plans should not be carried over unless it is clearly identified as historical or dated appropriately. Including outdated information can lead to confusion and reduce clarity. All content must focus on the older person's present needs and circumstances.

Assessors must:

- Draft Concerns and Goals that are clear, actionable, realistic and written from the older person's perspective (e.g., I find showering to be painful (concern). I would like to learn ways to have a shower without pain and reduce my pain rating from moderate (6/10) to mild to (3/10) (goal)).

- Link the older person's Concern to their needs as detailed in the relevant assessment domain in the IAT (e.g., Physical and Medical domains of the IAT provide details of Mr Arnold's functional limitations with showering and the pain he is experiencing).

    - Consider whether the older person will benefit from a short-term reablement intervention to maximise their independence, choice and quality of life, and the older person's capability, motivation, and strengths to contribute to their goals. Reablement can be provided by the assessor or by CHSP providers, with assessor review to determine when the reablement period should be finalised and what ongoing support (if any) may be required for the older person.

    - Consider whether the goals identified suggest suitability for Restorative Care Pathway (RCP) such as improving function, learning, reablement, or other goals which support delaying the need for higher level or ongoing services. This consideration should include whether a person has the motivation and capacity to actively participate in RCP including attending frequent allied health interventions (over more passive interventions). The need for a multi-disciplinary allied health and/or nursing approach to care must also be required before recommending RCP. Consideration of long-term needs should also be given before approving RCP as it will impact their position on the Support at Home prioritisation system.

    - Consider whether available units of funding for the RCP are low. If the recommendation for the RCP classification may not approved by the Assessment Delegate due to no units being available, assessors could contact the older person to discuss alternative supports for recommendation.

    - Consider, throughout the assessment, whether the older person will benefit from assistive technology and home modifications funding to support functional needs and safety at home in areas such as:

        - managing body functions
        - self-care
        - mobility
        - domestic life
        - communication and information management

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5.7.7. IAT outcome

If an assessor plans to recommend ongoing home support for an older person through Support at Home (SaH) or Commonwealth Home Support Program (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.

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If the IAT Outcome results in 'ineligible for CHSP/SaH', the person is not eligible to receive CHSP or ongoing SaH. In this circumstance the system will display a prompt to override to a higher classification. Assessors must not take this action. If by considering the eligibility criteria in the *Aged Care Act 2024* for residential care or transition care, the assessor wants to recommend these care types, it is appropriate to accept the ineligibility outcome and recommend these care types.

The IAT Outcome is designed to consistently determine an older person's CHSP or SaH classification, or their ineligibility for ongoing home support 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.

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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 before it is finalised.

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 of CHSP or Support at Home to 'ineligible for ongoing SaH/CHSP'. Assessors can then recommend these care types in the support plan.

In very limited circumstances where TCP is recommended alongside SaH services, an assessor should accept the SaH classification generated by the IAT Outcome and add TCP as a care type in the Support Plan.

If the IAT Outcome has recommended 'ineligible for CHSP/SAH' and the assessor, in considering the eligibility criteria in the *Aged Care Act 2024,* considers it appropriate to recommend transition care or residential care, they can accept the ineligibility outcome and recommend these care types.

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.

Important:

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 *Aged Care Rules 2025 (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 (e.g. SaH class 5 to 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.

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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/their <eligibility for CHSP/level of funding for Support of Home> OR <ineligibility for ongoing home support 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 e.g. 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 home care services.
- 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).

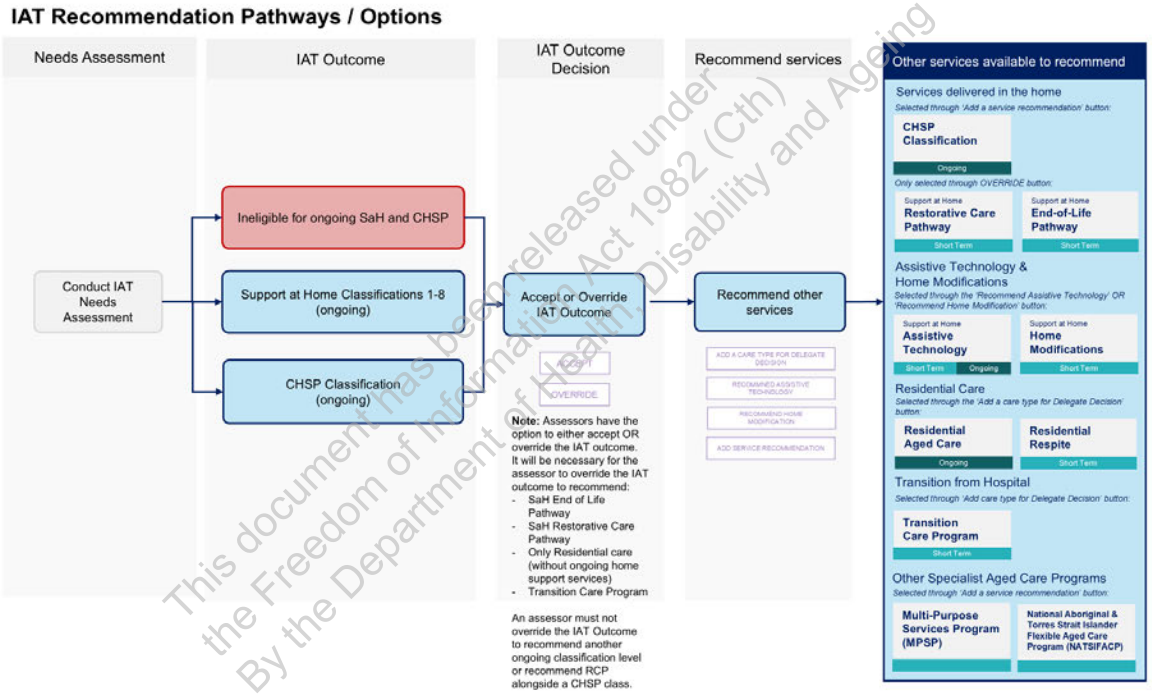

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Figure 4 - IAT recommendation pathways and outcomes

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5.8. Converting a home support assessment to a comprehensive assessment

If an assessment is triaged as a home support assessment and the IAT outcome generates a Support at Home classification or the assessor wants to recommend residential care (permanent or short term) , the assessment will need to be converted to a comprehensive assessment under the supervision of a staff member who holds a clinical assessor role in the My Aged Care Assessor Portal.

Note: Enrolled Nurses (EN) who hold the clinical assessor role cannot provide clinical supervision to non-clinical assessors. This is considered outside an EN's scope of practice.

In the expanded view of the *Goals and Recommendations* tab, the assessor will have the option to convert to a comprehensive assessment if the current assessment type is Home Support. An assessor will only be allowed to convert to comprehensive assessment from a home support assessment.

In assessments where services under the Support at Home program and/or residential care are recommended, but clinical questions are not triggered in the IAT during the assessment, an assessor will need to seek the supervision of a staff member who holds a clinical assessor role in the My Aged Care Assessor Portal. The supervising assessor will need to be nominated before the assessment will be converted.

If a clinical assessor has already provided clinical attendance during the assessment and nominated as the supervising assessor, the details saved when the IAT was finalised will display as read-only.

When the assessment is finalised, a system notification 'Notification of Supervised Assessment' will be sent out to the outlet associated with the nominated supervising assessor. This notification will be visible on the Assessor Portal as per existing notifications functionality.

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5.9. Developing a high-quality support plan

The Support Plan is a plain language summary of the older person's situation, strengths, goals, aged care needs and recommendations, based on information obtained during the completion of the IAT.

The Support Plan sections include:

- Assessment summary
- Concerns and goals
- Service recommendations

The role of an assessor, when developing the Support Plan with an older person, is to consider IAT findings and the older person's needs holistically to recommend support most appropriate to their needs and circumstances.

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Note:

As of 1 November 2025, the Support Plan functionality in the system is changing to accommodate the Support at Home classes and associated service recommendations and AT-HM scheme. The Support Plan printed document that's sent to the client is not changing substantially, other than a few wording tweaks for usability and to align with the Act.

Once finalised, the Support Plan is sent to the older person, and their registered supporter/s and/or appointed decision maker/s as applicable (via post and/or email), as a record of the assessment, accompanied by a Notice of Decision letter. Registered providers also use the support plan to inform the individual's care plan; therefore, accuracy and clarity is essential.

Referral codes will be included in the Support Plan for the majority of services approved however there are several nuances about where they will appear depending on the program or pathway. For further detail on how referral codes will be communicated to clients and providers, see Chapter 7 ‘Post Assessment Referral and Services Access’

5.9.1. Assessment summary

The assessment summary section of the Support Plan is a succinct overview of the assessment that appears on the Support Plan for the older person.

When completing the assessment summary, the My Aged Care system allows the assessor to pre-populate a summary of the older person’s functional ability, support considerations and complexity indicators that were identified during the assessment. The pre-populated information will be displayed in the ISBAR format, which is the required template for recording information in the assessment summary.

Assessors must use a standard template (see ISBAR approach below) to complete the assessment summary to ensure information is recorded in a consistent manner across assessment types. It is simple to adopt and helps make information easier to read while better supporting the delegation process and assisting the service provider to develop the care plan.

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The assessment summary must:

- Be written in a succinct manner (using the ISBAR approach), focusing on relevant/essential information.
- Be presented in a structured way that makes the information easy to interpret.
- Be grammatically correct and free from acronyms, abbreviations, jargon, and unnecessary headings.
- Provide a holistic and complete summary of the older person’s assessment at that time.
- Be relevant. Only include information that is relevant to the older person’s current situation. This may mean updating previous information.

Assessors must also:

- Use the ‘pre-populate’ function in the Assessor Portal to enable the ISBAR template to tailor the pre-populated assessment information in consultation with the older person. Ensure the Assessment summary is not limited to pre-populated information but includes a holistic, comprehensive view of the older person as per

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information collected from the assessment. Information must not be in dot point form and should be re-written in a sentence format this is readable to the older person. See template in the Table 21 below.

- Review and edit information populated from the assessment – such as functional needs, health conditions, support considerations, and complexity indicators. For a SPR or reassessment, the assessor (in updating previous information) may need to remove content that is no longer current to remain within the 5000 character system limit. All past versions of the Support Plan are retained as a record of any deleted content. Each Support Plan must reflect the older person's current needs and circumstances. Historical content needs to be clearly identified or removed to ensure clarity of current needs.
- If clinical attendance occurred during the assessment process, the assessor must make a note of this in the Support Plan.
- Note: Enrolled Nurses (EN) who complete a comprehensive assessment must include a statement in the support plan that the assessment has been conducted under direct or indirect RN supervision within the same organisation

All support plans within the assessment summary must be written using the ISBAR approach. It is expected assessors use the ISBAR format as a guide on how information is structured in the assessment summary with clear headings and subheadings where required. This ensures readability for not only the older person, but for their carers, service providers or future assessors, providing a holistic view of the assessment and older person.

Note to Aboriginal and Torres Strait Islander Assessment organisations: Torres Strait Islander person.

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Table 23. Assessment summary template using the ISBAR approach

ISBAR topic	Assessment information
Introduction	• Older person's name and age • Reason for assessment, including referral details (who made the referral and why, if appropriate) • Assessment details – type (home support or comprehensive), date, location, mode, attendees, assessor name
Situation	• Key health conditions that impact functional limitations and need for an aged care assessment • Medical issues (clinical assessors to include diagnosis status) *

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ISBAR topic	Assessment information

Background	• Living arrangements*
	• Current social situation and social history*
	• Current support
	  ○ Carer support (including details of Power of Attorney in place)
	  ○ Other informal supports*
	  ○ Current services including aged care, mental health, disability, palliative care

Assessment	• Carer profile • Function • Medical and medications • Physical and personal health and frailty • Social • Cognition • Behaviour • Psychological • Home and personal safety • Financial or legal • Support considerations • Whether clinical attendance was sought by a non-clinical assessor • Reference the use of any validated assessment tool (including those conducted through use of clinical attendance), the outcome of the tool and how that outcome was incorporated into the assessment.

Recommendations	• Previous approvals
	• Current recommendations*
	  ○ Reason for the recommendation (the older person benefit from X)
	  ○ Comments relating to the urgency of service
	  ○ Who is to action the recommendation – older person, assessor
	  ○ Recommendations associated with the carer or associated people support
	  ○ Recommendations are linked to assessment outcomes and/or the older persons Goals and Concerns.
	• Referrals*
	  ○ Status of referral (e.g., referral made with consent, older person declined referral)
	  ○ Who is responsible for contacting services
	  ○ Time-limited/end date or review date, or a rationale for ongoing services.
	• Contact details (if not older person) *

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ISBAR topic	Assessment information
	Who has been sent a copy of the Support Plan, including whether it has been linked to the older person's My Health Record*

*Indicates items that are not pre-populated

Further guidance on **the information that should be included under each heading is below:**

Situation section: Ensure this section outlines the primary reasoning for the referral for aged care reason including any linkages to functional, social, psychosocial and environmental factors. This section should include an older persons' medical history with specific reference to the primary health condition(s) that impact their activities of daily living and/or social situation. Include any recent hospitalisations or access to ongoing medical intervention. This should link to any medical services the older person is currently receiving including any specific specialists, doctors or other medical professionals they are currently seeing (e.g. GP)

Background section: Include information that pertains to the older person's current social situation and any social history with details on living arrangements, work and/or social engagements. This includes caring arrangements (formal or informal) that are in place for the older person and what specific supports they are currently providing to the older person. This should also outline any carer stress or carer sustainability issues pertaining to the older person. Assessors should outline any aged care services or other government or state-based services that are being accessed at the time of the assessment.

Assessment section: include all relevant sections of the assessment and highlight any complexity indicators. It should include all validated assessment tools and its scores that were used in the 'assessment' section along with an explanation of what the score indicates. The assessor should exercise clinical judgement on whether specific scores should be excluded (e.g. sensitivity content for the older person)

Recommendation section: provide information on how to link the older persons' goals to the service recommendations and approvals**.**

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Note:

Where a comprehensive assessment was conducted by an Enrolled Nurse under the supervision of a registered nurse according to the Nursing and Midwifery Board of Australia - Enrolled nurse standards for practice, this must be stated in the introduction of the Support Plan. Additionally, the name of the registered nurse must be recorded within the Support Plan.

5.10. Wellness and reablement approach

Wellness and reablement are person-centred, holistic approaches to service delivery. They build on people's strengths, capacity and goals to promote greater independence and autonomy. Wellness and reablement approaches are based on the premise that,

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even for individuals who experience frailty, older people want to improve their physical, social and emotional wellbeing, and remain living at home, connected to their community.

By focusing on capacity-building and restoring or maintaining function, wellness and reablement approaches directly contribute to the wellbeing outcomes described in the Act and the strengthened Aged Care Quality Standards. These support older people to live safely, independently, and with a sustained sense of meaning and connection in their own homes and communities.

5.10.1. Delivering reablement

The provision of wellness and reablement approaches should be embedded in the assessment and support planning processes. Wellness and reablement underpins all assessment and service provision, drawing on the wellness philosophy to inform a way of working with people. Wellness and reablement are inclusive approaches that involve assessment, planning and delivery of supports that build on the strengths, capacity, and goals of individuals irrespective of age, capacity, diagnosis or setting[3]. Additionally, these approaches build on people's strengths and goals to promote greater independence and autonomy in daily living tasks, as well as reducing risks affecting the ability to live safely at home. They avoid 'doing for' when a 'doing with' approach can assist individuals to undertake a task or activity themselves (or with less assistance), and to increase satisfaction with any gains made.

Reablement approaches involve time-limited services for a period of up to 12 weeks and always include a specific goal. Time-limited support aims to address a specific barrier to independence and to support the older person getting back to doing things for themselves. This involves a targeted timeframe, developed with the older person, to achieve their goals.

It should be noted that wellness and reablement approaches should be adopted by all assessors, including clinical assessors. For clinical assessors who are undertaking a comprehensive assessment, the option is also available to recommend an older person to receive a reablement service under CHSP if it is appropriate to do so.

A wellness and reablement approach to assessment means where possible, assessors undertake a 'show me' (active) assessment in which older people demonstrate how they undertake certain tasks to better understand their limitations and identify risks. This is distinct from the traditional "tell me" approach used by assessors.

Understanding what a good day looks like for an older person and how it relates to their individual goals and outcomes is important to determine short-term support needs during an assessment. This could be maintaining a level of activity or independence or working towards regaining it. Time-limited reablement is usually delivered within a 12-week period with the aim to wrap up and cease the services when the older person has met their goal or specific outcome.

Time-limited reablement under the CHSP that assessors may refer older persons for can include:

[3] Metzelthin, S.F., Rostgaard, T., Parsons, M., & Burton, E. (2020). Development of an internationally accepted definition of reablement: a Delphi study. *Ageing and Society, 42*, 703 - 718.

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- Learning a new skill, or actively working to regain or maintain an existing skill modification to a person's home environment,
- Providing access to assistive technology to help live more independently and safely in the home.

For example, learning a new skill could require referral for support on how to prepare simple meals for themselves, rather than referring for meals delivery. Regaining or maintaining existing skills could require referral for Allied Health and Therapy Services to ensure the older person can continue to transfer around the home and reduce the risk of falls.

As part of the assessment process, the assessor will need to work with the older person to identify whether they would benefit from a reablement approach to home support services, based on their needs and goals.

If the older person agrees short-term reablement support is appropriate and/or beneficial to them, the assessor should include service solutions within the Support Plan to promote their independence. The assessor must record the reason for the reablement period within the Support Plan such as:

- rebuild confidence and independence in mobility
- rebuild confidence and independence in cognitive abilities
- adaptation to functional limitation
- support the development/relearning of daily activities
- task simplification and energy conservation for managing housework
- promote social contact, community access and participation
- skills development in using public transport
- supporting independence through assessment for appropriate assistive technology
- training in the use of assistive technology
- supporting independence through assessment for home modifications ensuring safe living environments.

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The Support Plan may include recommendations to assist the older person to maintain and strengthen their capacity to continue to undertake daily activities and maintain social and community connections. Due to the nature of reablement supports, it is possible there will be several items in the Support Plan that need to be delivered in a coordinated way across a number of service types over a limited time period. In these circumstances, the assessor could refer an older person to a lead provider – the organisation or individual provider who will deliver the key services as identified in the Support Plan.

The assessor may also need to take on a coordination role to ensure that all services in the Support Plan are linked to a CHSP provider, and that they will all be delivered within the timeframe of the overall reablement service. For older people receiving reablement support, assessors must include review dates on the older person's Support Plan for the purposes of reviewing the older person's progress towards their goals and desired outcomes, requirement for ongoing services, or whether to adjust the services required.

The reablement function on My Aged Care is designed so that the Support Plan can be finalised but also kept open for the support period to allow additional edits to be made (by the assessor who completed the assessment). The timeliness Key Performance Indicator (KPI) will not be impacted. The timeliness KPI ends at the "finalise Support Plan & keep open for support period".

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For a smaller sub-set of older people, CHSP restorative care may also be appropriate, where assessment indicates that the older person has potential to make a functional gain. Restorative care under CHSP involves evidence-based interventions led by an allied health worker or professional that allows a person to make a functional gain or improvement after a setback, or to avoid a preventable injury.

The department's expected proportion is that assessment organisations recommend a period of reablement, which will include reablement based strategies and short-term support from the Aged Care Assessor and, where required, a referral to short term CHSP Reablement based support services, to a minimum of 10% of older people.

The following Steps/Activities are required for facilitating reablement:

- Consider if the older person would benefit from short-term reablement support, particularly if the older person has experienced some functional loss and expresses the desire to improve independence and/or regain confidence and capacity to resume activities, including connecting with their community.
- Where reablement is to be provided by one or more CHSP providers, recommend a period of reablement on the older person's Support Plan. This function allows assessors to identify older people who would benefit from reablement and allow assessors to make changes to the older person's Support Plan during the reablement period. Users accessing the older person's record (such as older people and service providers) will be informed that the older person is undergoing a period of linking support and/or reablement.
- Focus on elements of functional tasks that an older person can complete, and discuss what specific assistance they would benefit from in order to complete the task by themselves (to maintain and continue the independence to live at home)
- Discuss strategies an older person can employ to more easily manage day-to-day tasks (e.g., transport planning to meet goals around the use of public transport to maintain usual activities)
- It is important to ask what goals the older person wants to achieve. This can be as simple as making a cup of tea without help, or to understand their bus timetable. A goal could be walking to the local bus stop to go shopping, or to get to regular senior's events. Even small goals go a long way towards building self-confidence and regaining (or maintaining) skills to get back to doing things for oneself, to be more independent;
- When looking at what goals the older person could achieve, start by asking what a good day looks like for them? Then work out with the older person what goals they need to achieve to have more of those good days.
- Consider the older person's need for a mix of short-term, episodic, or ongoing services across CHSP service types (e.g., short-term personal care, episodic allied health, ongoing transport). Review this approach regularly to ensure the intensity of services matches the older person's needs.
- Maintain regular contact with the older person and providers and during the period of reablement.
- In consultation, determine when the reablement period should be finalised and what ongoing support (if any) may be required for the older person.
- Develop local knowledge of reablement-type services in the region. Discuss with local providers their capacity and willingness to take on short-term older people as part of a reablement episode.
- An expanded in-depth description of Supporting Independence: Reablement including older person scenarios is at Appendix F.

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Department of Health, Disability and Ageing website:

- Commonwealth Home Support Program (CHSP) 2025-27 Manual | Australian Government Department of Health, Disability and Ageing
- Wellness and reablement resources
- Living Well at Home – CHSP Good Practice Guide

5.10.2. Linking supports

The department has established services that will assist clients requiring support to access aged care services, including Care Finders, and Elder Care Support services.

For Aboriginal and Torres Strait Islander assessment organisations, Elder Care Support workers can be key partners in delivering culturally safe, trauma-aware, and healing informed assessments. where it is needed.

With a client's consent, Elder Care Support workers could attend an assessment to provide trusted experience for the older person. The assessor should work closely with Elder Care Support staff to facilitate a warm handover. This collaboration ensures continuity of care and supports a culturally safe and trusted transition for the older person into aged care services.

If an Elder Care Support worker has not been engaged prior to the assessment, the assessor should assist the older person in connecting with Elder Care Support services delivered by Aboriginal Community Controlled Health Organisations This support can help build trust, improve understanding of the aged care system and facilitate a smoother transition into services.

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Department of Health, Disability and Ageing website:

- List of Elder Care Support Providers | Australian Government Department of Health, Disability and Ageing

Where a client's complex circumstances may be impeding their access to aged care services, Linking Service Support will assist in linking them to the various services they require to live in the community with dignity, safety and independence. The aged care needs assessor must determine if a client requires Linking Service Support.

Linking Service Support activities are aimed at working with the client to address areas of vulnerability that are preventing access to receiving mainstream aged care support, to the extent that the client is willing or able to access aged care services. The issues include homelessness, mental health issues, drug and alcohol issues, elder and systems abuse, neglect, financial disadvantage and cognitive decline.

Linking Service Support through the Assessment Organisation is limited to short-term case management or care coordination to the Point of Effective Referral. It is not designed to provide ongoing support services. The role of the aged care needs assessor is finalised when:

- a referral for Services is accepted by a Service Provider.
- the client has accepted responsibility for managing their own referral for services;
- the client has made a choice not to proceed with aged care needs assessments or aged care needs assessment related services; or
- the outcome of the aged care needs assessment is that no further action is required by the aged care needs assessor.

If longer term support is needed, with consent from the older person, Elder Care Support workers or care finders should be engaged to help clients navigate the aged care system.

Key Performance Indicators have been set by the department for assessment organisations to increase the referral of older people to time limited Linking Services Support. This KPI specifies that 2.5 per cent of all clients will receive a time-limited Linking Services Support to address areas of vulnerability that are preventing access to receiving mainstream aged care support. Support may include short-term case management and non-aged care support.

Delivering linking support/care coordination to vulnerable older people

Facilitating linking support can greatly benefit some older people whose circumstances may impede their access to aged care services. Linking support may be conducted by providing short-term case management or care coordination to the point of effective referral. Activities are aimed at working with the older person to address areas of vulnerability which prevent access to receiving mainstream aged care supports or care, to the extent that the older person is willing or able to access aged care services. Issues leading to vulnerability could include homelessness, mental health concerns, drug and alcohol issues, elder and systems abuse, neglect, financial disadvantage, cognitive decline and/or living in a remote locality.

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Assessment organisations are expected to provide short-term case management services for vulnerable older people who require linking services.

Identifying a vulnerable person for linking support

The IAT is designed to assist an assessor to identify the complexity of an older person who may require linking support. Assessor judgment also plays a significant role, noting the presence of the same risk in different people may signify varying degrees of vulnerability. If applicable, the assessor selects from the following complexity indicators.

The older person:

- is living in inadequate housing or with insecure tenure or is already homeless which compromises their health, wellbeing, and ability to remain living in the community,
- is at risk of, experiencing (or suspected to be experiencing) abuse,
- has emotional or mental health issues which significantly limits self-care capability, requires intensive supervision and/or frequent changes to support,
- is experiencing financial disadvantage or other barriers that threaten their access to services essential to their support,
- has experienced adverse effects of institutionalisation and/or systems abuse (e.g., spending time in institutions, prisons, foster care, residential care or out of home care) and is refusing assistance or services when they are clearly needed to maintain safety and wellbeing,
- is exposed to risks due to drug and/or alcohol related issues and is likely to cause harm to themselves or others,

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- is exposed to risks or is self-neglecting of personal care and/or safety and is likely to cause harm to themselves or others,
- has a cognitive impairment (e.g. memory problem or confusion) that significantly limits self-care capacity, requires intensive supervision and/or frequent changes to support.

The assessor may also need to consider challenges faced for people living in remote or very remote regions.

The assessor then selects, if applicable, the 'Risk of Vulnerability Cohort' from the following:

a) Culturally and linguistically or ethnically diverse individual; and/or
b) Aboriginal or Torres Strait Islander
c) Living in a rural or remote area
d) Financially or socially disadvantaged
e) A Veteran
f) Homeless or at risk of homelessness
g) Lesbian, Gay, Bisexual, Transgender, Intersex, or other gender diverse
h) Individuals
i) A person separated from their parents or children through forced adoption or removal
j) A socially isolated individual
k) Other (assessor to specify)

Further information on identifying and supporting vulnerable cohorts is included in Chapter 12 'Supporting Diverse Experiences and Needs'.

Following this, the assessor will decide whether the person would benefit from Linking Support by considering and selecting (if applicable):

(a) whether complexity indicators impact the older person's ability to live independently in the community

(b) whether urgent intervention is required and

(c) whether the older person has indicators that impede access to delivery of aged care services.

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Where the access to delivery of aged care services might be impeded, the assessor is to recommend Linking Support and short-term case management.

Linking support and short-term case management activities

The level of linking service support offered by assessors is time-limited and is not designed to provide ongoing support services.

However, it is understood that in some circumstances due to ECS services not being available in their area or due to preferences of older people who have already established trusted relationships with an assessor from an Aboriginal and Torres Strait Islander assessment organisation, an assessor may have a role in providing ongoing case management services to their clients.

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The activities that an assessor chooses to undertake when providing linking support will be dependent on the needs, circumstances, and preferences of the older person, and may include one or more of the following:

- **Information provision and tailored advice** – provision of clear, reliable, up-to-date, and relevant information and advice to older people regarding service options and pathways.

- **Guided referral** – facilitation and management of the process of linking a vulnerable older person to appropriate service pathways within or outside the aged care system. This includes monitoring the success of the referral process and ensuring that linking to the appropriate services is achieved.

- **Service coordination** – where an older person's needs are complex and require a range of services spanning multiple sectors, the assessment organisation oversees the coordination of these services.

- **Advocacy activities** – for the vulnerable older person to gain access to the identified support services, the assessment organisation may be required to speak, act, and write to the identified service providers on behalf of the vulnerable older person.

- **Case conferencing/multidisciplinary service coordination** – provision of comprehensive, integrated service coordination for older people with high-level needs. This involves using a case conferencing/multidisciplinary service coordination approach which brings together a number of team members and a suite of services across sectors in order to meet the older person's needs at different levels.

- **Establish local knowledge and networks** – the assessment organisation establishes local connections with service providers which support vulnerable people in their region.

- **Administrative tasks** – establish and undertake the administrative functions necessary to support the smooth and seamless progression of vulnerable older people through the required services. Some examples are:
    - Contact the relevant service providers on behalf of the older person (e.g., legal services, health services, housing services etc.)
    - Obtaining the necessary older person information from various sources and organisations
    - Compiling and completing the necessary forms on the older person's behalf
    - Organising relocation services for the older person, if required (e.g., removalist and utility services)
    - Organising cleaning services for the older person's place of residence, if required
    - Documenting the older person's progress.

It is expected that assessors will work closely with vulnerable older people on a low income who are living with hoarding behaviour or in a squalid environment and at risk of homelessness or unable to receive the aged care services they need. Where there is no coverage for hoarding and squalor assistance, the eligible older person can be referred to CHSP services such as social work and other services targeted at avoiding or reducing

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the impact of hoarding and squalor situations (see Chapter 6 Aged Care Programs – Hoarding and squalor assistance).

All Care Finder and Elder Care Support Program clients seeking aged care services must be assessed by My Aged Care via the assessment services to determine eligibility and the need to receive additional CHSP services. People receiving assistance through the Care Finder program or Elder Care Support program may be eligible to access CHSP services targeted at avoiding homelessness or reducing the impact of homelessness. Any entry level CHSP services made available to a Care Finder or Elder Care Support Program older person between the age of 50 and 65 must be targeted at avoiding homelessness or reducing the impact of homelessness.

Refer to Chapter 12 for more information on support for a vulnerable person.

My Aged Care system function – linking support

The linking support function on My Aged Care provides assessors with the opportunity to record activities for older people identified as benefiting from linking support. The function allows assessors to make changes to the older person's Support Plan during the linking support period. Users accessing the older person's record, such as older people, contact centre and service providers, will be informed that the older person is undergoing a period of linking support. The department's expected proportion is that assessment organisations deliver linking support to a minimum of 2.5% of older people.

The function is designed so that the Support Plan can be finalised and kept open for the support period and the timeliness KPI will not be impacted. The timeliness KPI ends at the 'Finalise Support Plan & keep open for support period'.

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5.11. Vulnerable older people relating to aged care services

Where the assessor wishes to monitor the older person's access to aged care services more closely, they can elect (or at the older person or appointed decision maker's request) to be notified of correspondence sent to the older person. This particularly applies to vulnerable older people who need assistance with the process of finding a suitable provider, and do not have support to assist them. Only one person from an assessment outlet can be selected to receive this notification. This person's contact details will also appear on all correspondence with the older person.

An assessor should also consider whether a person can access support through the Care Finder and Elder Care Support Program.

This notification can be enabled from any tab in the older person's Support Plan or on the 'Approvals' tab in the older person record. The notification link will only be enabled if the older person has been marked as 'seeking services', or a recommendation has been made.

Where an assessor is receiving Support at Home notifications for a vulnerable older person who has been approved to access funded aged care services, the assessor is able to extend an older person's acceptance period for ongoing services beyond the 56-day entry period, and extend the older person's time to select provider for an additional 28 days through the extension process on My Aged Care.

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Care finder program | Australian Government Department of Health, Disability and Ageing

Elder Care Support | Australian Government Department of Health, Disability and Ageing

The assessor must carry out the following steps and activities:

- Consider if linking support is required – particularly if the older person presents with two or more complexities (and/or risk of vulnerability) – and may have been further confirmed through the support considerations process.
- If identified as 'vulnerable', with the older person's agreement, the older person will be provided with linking support. If not applicable, check an appropriate plan is in place. Therefore, the IAT and/or the Support Plan evidences the complexity or risk of vulnerability support has been considered and documented. If linking support is applicable, develop the Support Plan to include linking support, recommending the period of linking support and the planned activities. Action the recommended activities, monitor progress and record the outcomes (using the linking support function).
- Consider all available care and support options appropriate to the needs of the older person and facilitate the provision of services to the point of effective referral.
- Liaise, consult, and work collaboratively with all stakeholders and service providers in a multidisciplinary approach across service sectors to support individual older person needs. For example:
    - Contact relevant experts and service providers to discuss the older person's current situation and Support Plan moving forward, and to assist with the co-ordination of the older person's care whilst receiving linking support (e.g., care finders, CHSP Hoarding and Squalor providers, health, housing and legal services, community Geriatric Evaluation and Management teams, advocates, social, case management and/or mental health workers and local councils).
    - With older person's consent, obtain the necessary older person information from various sources and organisations.
    - Maintain regular contact with the older person, providers, and those co-ordinating services during the period of linking support.
    - Assist older people with issues relating to transition to alternate service options.
    - In consultation with the older person, determine when the linking support period should be finalised, and what ongoing support (if any) may be required for the older person
    - If aged care service access is not approved, consider referral to a support service outside of aged care and if relevant a support service which provides a coordination or case management function.
- Offer the information in a variety of formats to promote equitable access (e.g., paper-based, electronic, face-to-face, over the phone, etc.) and where appropriate, include information to self-refer to the identified services and supports and information on rights, responsibilities, and mechanisms for complaints.

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5.12. Recommending aged care services

Note:

Service approvals are a fundamental change under the Aged Care Act 2024. Providers will be unable to deliver or claim for any services for an individual that is not approved in the support plan (even if there is an immediate need).

Once the IAT has been finalised, an assessor will assess an older person's need for aged care services as defined in **Sections 66 to 68** of the *Aged Care Act 2024*.

As an assessor, if you recommend that an older person's access to ongoing Support at Home, Restorative Care Pathway or End-of-life Pathway, assessors will be taken directly to the 'Add Home Support services' page. On this page specific services are grouped by service type. These service types relate to the services in the Aged Care Rules 2025.

Under each service type, specific services will appear (known as service levels). For example, under the service type *Domestic Assistance*, services such as general house cleaning, laundry service, shopping assistance etc. will display. All services are pre-selected, except for services in the 'prescribed' service types *Allied health and Therapy* and *Therapeutic Services for Independent Living*. This is due to the specific nature of these services and should only be recommended if an older person has a need for them.

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Important:

For any service type other than *Allied health and Therapy* and *Therapeutic Services for Independent Living* (the 'non-prescribed' service types), if you think the older person needs <u>any</u> service in the service type, then you need to select <u>all</u> services in the service type.

This is because, for the non-prescribed service types under the Act, an older person is approved for access *at the level of service type only*. This applies to service recommendations for Support at Home classifications and CHSP.

Under Section 65 of the *Aged Care Act 2024* an older Aboriginal and Torres Strait Islander person only needs an approval at the level of service group and classification type to receive aged care services. This means that if the older person is approved for a service group, they are automatically approved for *all service types and services* in that group.

In the system, however, for the *home support* service group you must ensure all service types and services are selected in the 'Add home support services' page, if the older person is Aboriginal or Torres Strait Islander. If you add Assistive Technology, Home Modifications or residential aged care to the support plan, there is no need for you to select specific services.

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On the *Add Home Support services* page, assessors can also:

- recommend the frequency and intensity of services
- link the older person's concerns and goals to the services that have been selected.

Care types and services that are not part of Support at Home can be recommended by clicking 'Add a Service Recommendation' or 'Add a care type for delegate decision' under *other recommendations* in the *Goals & recommendations* tab. This applies to MPSP and NATSIFACP services, Residential Care, Transition Care and CHSP.

5.12.1. Making service recommendations

There are two types of recommendations that can be made on the Support Plan:

a) **Service recommendations** represent referrals that can be made through the Assessor Portal to Commonwealth-subsidised aged care services.
b) **General recommendations** relate to a type of support that is non-government funded or where a referral is made outside of the Assessor Portal. All recommendations – whether government-funded services, specialist programs, linking support, or general actions – must be clearly documented in the Support Plan.

Recommendations for aged care services must be aligned to an older person's current needs. If multiple services are recommended, the assessor must clearly link each service to a relevant concern and goal. If there are no recommendations as a result of the assessment, the assessor must provide clear reasons for the outcome within the Support Plan and communicate clearly to the older person.

Assessors must clearly articulate the service recommendation details – service type and services (if applicable), start, end and review dates (if applicable), frequency, intensity, priority, and outcome:

- The frequency and intensity of the services may be recorded if indicated, however may be decided at a later point by the service provider with the development of the Care Plan. Example: Two times weekly.
- The priority for the service recommendations is based on the older person's needs and urgency for services. The determination of urgency for services is based on the older person's circumstances, such that there is an urgent need for services which, if not met immediately, may place the older person's health and safety at risk.
- Include CHSP service (short-term or ongoing) information in the assessment summary (see previous sub-section: Assessment Summary).

Note:

If a non-clinical assessor is recommending services other than CHSP, they must seek the supervision of a clinical assessor to assist with providing recommendations for those services e.g. Support at Home ongoing, residential care and AT-HM.

If clinical attendance occurred during the assessment, this supervision should be given by the clinical assessor who provided this attendance.

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If services that are not CHSP services are recommended and clinical questions were not triggered in the IAT, the non-clinical assessor will need to seek the supervision of a clinical assessor upon converting the assessment to a comprehensive assessment.

Detail all care options agreed with the older person, ensuring general and service recommendations:

- Are evidence-based, defensible and are clearly drawn from and linked to the older person's goals and needs/area of concern. For example: a recommendation for respite, links to information on the older person/carer relationship, dementia support, and any difficulties or concerns that are experienced to reduce carer stress and support the care relationship.
- relate to the older person's current unmet needs and are supported by the assessment.
- take into account their identified support considerations when recommending options for support.
- consider the availability and capability of services and supports to meet the older person's care needs including:
- services in and outside of aged care
- informal supports, what family, friends and neighbours contribute (including the sustainability of these)
- General recommendations include responsibility to action (older person/other).
- In some instances, Aboriginal and Torres Strait Islander assessment organisations may also be an aged care provider. It is critically important that clients are provided with choice and control over service providers from whom they would like to receive aged care services. Assessors should discuss all the options with the older person.

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5.12.2. Setting the 'service seeking' preference for prioritised services under the Support at Home program

Access to ongoing Support at Home (SaH) classifications and AT-HM under the Support at Home program (the AT-HM scheme) is managed through three independent priority systems:

- the Support at Home Priority System – for the ongoing SaH classifications
- the Assistive Technology Priority System – for AT under the SaH program
- the Home Modifications Priority System – for HM under the SaH program.

As part of the assessment process, it is important for assessors to have a clear conversation with the individual about whether they are seeking to receive these services through the Support at Home program.

There is a separate 'seeking services' preference field in the Support Plan section of the Assessor Portal for each of these recommendations (ongoing SaH classification, AT and HM). Assessors must record if the client is 'seeking services' or 'not seeking services' through the Support at Home program for each of the recommendations, in line with the following guidance:

- For clients seeking these services through the Support at Home program, the assessor should set the relevant service seeking preference to 'seeking services'. This ensures that the older person is placed on the appropriate priority system(s).

- For clients not seeking these services through the Support at Home program, the assessor should set the relevant service seeking preference to 'not seeking services'.
- This option makes sure the client **does not** enter the relevant priority system(s) and will not be allocated funding under the Support at Home program. Relevant circumstances include when:
    - the client has chosen to access services through NATSIFACP or MPSP and so they do not require services from a SaH provider (or funding from the SaH program)
    - the client does not want to access the recommended services at this time.

If the older person later wants to access one of these services through the Support at Home program, they can change their preference and enter the relevant priority system. Older people wanting to enter the AT or HM Priority System will need to be a Support at Home participant (for ongoing home support) to do this. For all three priority systems, wait time is always counted from the original access approval date of effect. That is, for older people who enter any of these priority systems at a later time, it will be as if they had stayed in the queue from their first approval.

An older person can change their service seeking preference by:

- contacting My Aged Care
- using the My Aged Care Online Account.

5.13. Review of Support Plan

A review date can be entered on the Support Plan and reason for the review such as for "12-month review for CHSP ongoing service recommendation". Linking support and reablement start and end dates and review dates are displayed on the Support Plan. The 'Associated People' section of the Support Plan helps assessors identify the people who will be helping the older person meet their goals, or who may be providing support. It also assists in checking whether the older person consents to the associated person receiving their Support Plan.

5.13.1. Scheduling a Support Plan Reviews for Aboriginal and Torres Strait Islander assessment organisations:

Acknowledging that it may take a longer time to accurately identify the holistic aged care needs of an older Aboriginal and Torres Strait Islander person, following an initial assessment, an SPR should be scheduled to ensure the Support Plan remains responsive to the client's needs at the time of the assessment. The date should be:

- no later than 12 months after the assessment, and
- sooner if appropriate.

This approach enables the older person to access aged care services while enabling adjustments to the Support Plan if more needs are identified over time (most likely identified by the service provider) at the review date.

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5.14. Assessment wrap-up

At the end of the assessment, an assessor should inform the older person of the next steps so they have a realistic expectation of what will occur following the assessment. This will help the older person to feel more assured and increase their satisfaction in the overall assessment experience. There are a variety of resources an assessor might leave with an older person at the conclusion of an assessment that are also available in many languages other than English (see Chapter 13. Aged Care Resources for Consumers).

An assessor must:

- Inform the older person on the next steps, such as:
    - who to contact and in what instance (e.g., if the older person has chosen to be referred to service providers, they will be contacted by these providers to discuss details of the service being requested; if the older person has chosen to receive a referral code, they will need to take the code to the provider of their choice to access the service)
    - the actions they, or others identified in the Support Plan, are responsible for (e.g., visiting providers, organising a check-up with a GP/specialist)
    - identify the older person's preferred referral method to action service referrals to providers and specialist assessment (e.g., allied health, occupational therapy assessment or vision services)
- Consider the older person's information preferences (e.g., hardcopy or electronic copy) and their communication needs.
- Provide contact details to the older person on who they should contact in the future [e.g., the My Aged Care Contact Centre, the assessment organisation (name and contact details of the assessor), and one or more service providers].
- explain that the assessor recommendations will be submitted to the assessment delegate for approval and the older person will be contacted about the outcome.

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5.14.1. For Aboriginal and Torres Strait Islander Assessment Organisations:

Due to the higher likelihood of older Aboriginal and Torres Strait Islander people being vulnerable and require additional support to access services, it would be best practice to follow up with the client (or support network) post assessment as a matter of routine, particularly for those who:

- have complex social need;
- have limited family or community support;
- have experienced recent changes in health, housing, or care arrangements;
- have communication or cognitive difficulties that may impact understanding of the assessment;
- have referrals rejected/not actioned;
- have experience difficulties with accessing services;
- work on short-term goal(s) in line with the length of time stipulated in the Support Plan;
- need linking support and require short-term linking assistance for the purpose of implementing the Support Plan;
- have expressed uncertainty or concern about the process or services recommended; and/or

- are at risk of disengaging from services due to past negative experiences or systemic barriers.

Follow up may include, but not limited to:

- monitoring of referrals to services or negotiating with service providers for the provision of alternative services if necessary;
- discussion with the service provider and give advice to client on any follow up actions taken; and/or
- explaining any notifications/notices the older person may have received from MAC.

Resources | My Aged Care

5.14.2. Providing an assessment report for approval

Once the assessor has finalised the assessment, they must submit it for approval by an assessment delegate. For a comprehensive assessment, this delegate approval can be done on system. For home support assessments, this delegate approval workflow will be offline. A fact sheet is available to assessors and assessment organisations to manage this workflow.

Under the *Aged Care Act 2024*, assessors are required to provide the System Governor with a report of the assessment as soon as practicable after the assessment has been completed. This report is the support plan. System Governor functions at this stage of the assessment process are performed by (delegated to) Assessment Delegates. The assessor portal will support assessors to recommend the following to the assessment delegate for approval:

- **service groups**,
- the **classification type** (short-term, ongoing or hospital transition) for each recommended service group;
- the **classification level**
- any **service types** or **services**
- the **priority category** if required.

Assessors must also include in the support plan any information to support the Assessment Delegate to decide that the individual meets the relevant criteria (in the Act and its related rules) for the recommended approvals.

Assessors must ensure all information generated during the assessment is uploaded to the older person's My Aged Care Record following the completion of an assessment.

The fact sheet on non-clinical delegate workflow will be provided in the next addition of the Assessment Manual.

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6. Chapter 6: Aged care programs

What you'll find in this chapter

This chapter includes important information about the aged care programs that can be recommended by assessors to meet an older person's assessed needs and goals. It includes information about:

- Support at Home (Ongoing 1 – 8)
- Support at Home (Restorative Care Pathway)
- Support at Home (End of Life Pathway)
- Support at Home (AT-HM)
- Commonwealth Home Support Program (CHSP)
- National Aboriginal and Torres Strait Islander Flexible Aged Care Program (NATSIFACP)
- Multi-Purpose Service Program (MPSP)
- Transition Care Program (TCP)
- Permanent residential care
- Residential respite

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6.1. Support at Home - ongoing classifications 1-8

Support at Home improves on the four Home Care Package levels and consists of 8 ongoing classifications (1 – 8) with increasing levels of funding based on varying need in terms of the frequency and intensity of those services.

For participants assessed from 1 November 2025, a new classification framework will specify different funding levels based on the information captured during their assessment.

Funding amounts for each Support at Home classification are outlined below. Note that these amounts include the funding for care management, are indicative and are subject to indexation revisions.

In addition, there are 3 short-term pathways which are part of the Support at Home program, and these are defined as stand-alone service groups under the Act:

1. Restorative Care Pathway
2. End-of-Life Pathway
3. The Assistive Technology and Home Modifications (AT-HM) scheme

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Table 24. Budgets for Support at Home classifications

Classification	Quarterly Budget	Annual Amount
1	$2,682.75	$10,731.00
2	$4,008.61	$16,034.45
3	$5,491.43	$21,965.70
4	$7,424.10	$29,696.40
5	$9,924.35	$39,697.40
6	$12,028.58	$48,114.30
7	$14,537.04	$58,148.15
8	$19,526.59	$78,106.35
Restorative Care Pathway	$6,011.04 (up to 16 weeks) May be increased to $12,000 when eligible and if units of funding are available	
End of Life Pathway	$25,035.36 (up to 16 weeks)	
Assistive technology short term (12months)	Low ($500), medium ($2,000) and high ($15,000) funding tiers based on assessed need. A higher amount maybe approved with a valid prescription from a suitably qualified health professional. For progressive condition bundles, funding is available for 24 months (may be extended for another 24 months if required with declaration).	
Assistive technology On going	Assistance dogs $2,000 per year	
Home modifications Short term (12 months)	Low ($500), medium ($2,000) and high ($15,000) funding tiers based on assessed need.	

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Classification	Quarterly Budget	Annual Amount
	Providers may apply for a funding tier time extension of an additional 12 months for HM high tier (24 months in total).	

A participant's annual Support at Home budget is divided into quarterly (3-monthly) budgets. Older people receiving Support at Home (known as participants) can carry over unspent funds of up to $1,000 or 10% of the quarterly budget (whichever is greater) from one quarter to the next.

These budgets are segmented into quarterly allocations to provide tailored support based on the participant's classification.

Ten percent (10%) will be deducted from each participant's quarterly budget for care management delivered by their service provider. Care management involves:

- planning and coordinating services
- checking in with participants to ensure they are being well supported
- clinical advice and practical support to address any changes in need or issues that arise
- providing support and education where needed.

Support at Home Program Manual

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An Assessor's Role in budget planning and contributions

Assessors are not expected to develop detailed budget plans or explain contributions with Support at Home participants. The assessor may wish to give a high-level overview based on the information in this guidance document and direct their client to the Support at Home fee estimator tool.

A full fee estimator is available via the department's website myagedcare.gov.au/support-at-home-fee-estimator. This tool will allow people to plan budgets and estimate their contributions.

The assessor should emphasise that there will be an opportunity to discuss contributions further with their registered provider's care partner. A budget must be developed between the participant and their provider alongside the development of the care plan. The budget must outline how funding for participant's ongoing and/or short-term services will be spent in relation to the types and frequency of services outlined in their care plan, as well as any contributions for services to be delivered.

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6.1.1. The Support at Home Priority System

An older person approved to access ongoing Support at Home services (SAH classifications 1 to 8) will enter the Support at Home Priority System in one of its four priority categories:

- Urgent
- High
- Medium
- Standard

An older person's priority category is based on the information collected during the aged care needs assessment. It is automatically calculated using the responses to six different criteria. The amount of time the older person waits to receive their funding will depend on the priority category they are given. The priority category will be displayed under 'Approvals for a Client' in the Assessor Portal.

If an assessor makes changes to the following fields in an older person's client profile after the priority category has been calculated and the person has been placed in the queue, the system will automatically recalculate the priority category and queue position:

- Accommodation type
- No fixed address
- Lives with
- Aboriginal and Torres Strait Islander Status

An older person can request to be set as 'seeking services' or 'not seeking services' at any point. This can be done by contacting My Aged Care, or by using the My Aged Care Online Account.

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6.2. Support at Home - Restorative Care Pathway

The Restorative Care Pathway (RCP), under the Support at Home program, is designed to provide early intervention support to older people by:

- preventing or delaying the need for ongoing in-home care services or the need to access higher levels of ongoing care
- supporting participants to regain their ability to carry out daily activities
- helping participants to manage new or changing age-related conditions
- providing reablement education and skills to participants on how they can retain better function as they age for longer independent living.

The RCP can be provided in a home or community setting, or a combination of both. An older person can receive up to a maximum of two units of RCP in any 12-month period. The RCP cannot be undertaken consecutively and must allow a minimum 90-day period between episodes.

The RCP can be delivered for up to a duration of 16 weeks. Participants may have a shorter RCP episode, for example, where they reach their goals earlier.

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The RCP may also be accessed in addition to a participant's ongoing Support at Home budget. A participant with an ongoing Support at Home budget who is approved for RCP, can continue to access their ongoing services while undergoing the Restorative Care Pathway. Restorative care partners will need to ensure that services are complementary.

Important:

An approval for RCP is equal to 1 unit of RCP funding (approximately $6,000). RCP units are capped to 20,000 units of funding annually (managed as 5,000 units of funding per quarter) across Australia.

From 1 November 2025, system-based visibility of RCP caps will not be available. As a result, there will be no in-system prompts or controls to prevent the approval of RCP units beyond the quarterly caps.

Twice-weekly reports of allocations will be generated, allowing the Department to monitor RCP approvals and communicate with assessment organisations when approvals approach or exceed the assigned caps.

Assessors and Assessment Delegates should remain aware of any communication from the Department's Assessment Delivery Section regarding RCP units. This will apply to decisions made through assessment/reassessment and SPRs.

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6.2.1. Assessing for the Restorative Care Pathway

RCP provides a coordinated, multidisciplinary package of allied health and/or nursing services. An individual must require a range of different allied health and/or nursing interventions to be eligible for the RCP. For example, an individual only requiring physiotherapy, domestic assistance and gardening is not eligible as they do not meet the requirements for a multidisciplinary allied health and/or nursing team.

Supporting people to regain independence and function to facilitate less reliance on higher levels of care is a critical objective of RCP. The intent of the RCP is not for an older person to receive passive 'care' services but to be an active participant to safely regain lost independence based on their individual circumstances.

A reablement approach underpins the Support at Home RCP, aiming to restore capability and keep people as independent as possible.

A person is eligible to receive RCP only if they meet all of the following criteria:

- The person is assessed as experiencing functional decline that is likely to be reversed through frequent, multidisciplinary allied health and/or nursing interventions over a short period of time
- The person has goals which align with restorative care outcomes (improve function, want to be independent, rely less on others' help, regain previous levels of function, etc)
- The person demonstrates motivation through willingness and capacity to engage and actively participate in short-term clinical interventions to increase

independence (for example, willing to attend frequent allied health appointments, engage in exercise and/or nutrition classes, learn how to apply techniques to regain independence, increase health literacy and education, etc)

- The person has received an ongoing SaH classification through the IAT Outcome (please see note below)
- The person is not receiving or, eligible for, the Transition Care Program (they should also not be in hospital at the time of assessment)
- The person is not in permanent residential care
- The person is not eligible for, or has recently received, the End-of-Life Pathway
- The person has not been approved for more than two units of RCP funding in any 12-month period and/or at least 90 days have passed from the end of the 16 weeks period associated with the original episode.

Assessors must only recommend the RCP if all the above eligibility criteria are met.

Assessors may consider contacting the older person to discuss alternative supports for recommendation if the RCP units are near exhaustion.

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Case Study: Omar, age 66

Omar is 66 and lives with his wife, Barbara. He recently had a little fall which has left him with a few small issues but has severely impacted his confidence. He is after some help around the home, so he doesn't fall again. After talking to both Omar and Barbara, the assessor suggests he might like to consider Restorative Care Pathway (RCP)as:

- Omar still has quite good mobility but needs some help building up his balance and strength to restore his confidence.
- Omar has the support of Barbara and family who are keen to help him stay independent.
- Omar initially had some concerns about undertaking the RCP but after discussion with the assessor, he is willing to try it as he would like to remain independent at home.

Omar's restorative care provides:

- Biweekly strength classes which start as individual classes at Omar's home with an exercise physiologist but, as his confidence increases, transitions into group exercise classes at the allied health centre. This also provides opportunity for Omar to connect with others while supporting increases in physical and mental function.
- Nutritionist support which provides insight and education into nutritional requirements to support his increased activity and support good health (plus meeting any cultural food requirements).
- Two podiatrist appointments to assess for issues with his feet which are impacting his balance.
- A restorative care partner who works with him on his goals and continues to support Omar, checking in periodically, monitoring his progress and continuing to discuss how problems achieving his goals can be resolved to help restore his confidence with the multidisciplinary team (MDT).

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Outcomes

Omar regains confidence in his mobility. He teaches Barbara what he learns during his time receiving RCP services. They start attending strength building classes together at the local gym and join a walking group. After discussion with Omar and Barbara, the exit plan recommends no ongoing services are needed.

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Case study: John, age 55

John is a 55 year old Aboriginal man. He currently receives Support at Home classification 1 to help support him at home. He has several chronic health conditions and lives with his wife and adult son. His GP has recommended he be reassessed to help him manage his health conditions. After yarning to John and his family, the assessor recommends the Restorative Care Pathway (RCP). This is because services and education on how he can remain independent at home could help the household which is a good outcome for everyone. John knows he can manage his health conditions if given the support to do so.

His goals support restorative care outcomes (to regain function, keep level of independence, delay needing higher level of services). John was also approved for assistive technology and home modifications funding to support his RCP episode. This is funded through the Assistive Technology-Home Modifications (AT-HM) scheme.

Delivery

John's restorative care provides:

- Support and referrals to help manage his health issues including to a care manager at the local primary health network for his diabetes
- Support from a registered nurse who provides education and advice around how John can manage his health conditions.
- An occupational therapist (OT) visits several times to talk to John and his family about what assistive technology and home modifications can help him and, how John and his family can use the assistive technology safely and to check that home modifications meet John's needs.
- Administration and coordination costs of sourcing relevant AT-HM to support his restorative care goals.
- An Aboriginal and Torres Strait Islander Health Worker works with John to help provide cultural support, treatments and conduct relevant health assessments and provide connection to other relevant services, as required.

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John's ongoing Support at Home services continue. A restorative care partner helps ensure restorative care services complement his ongoing Support at Home services.

Outcomes

John's restorative care partner finalises the exit plan after reviewing the goals identified in John's goal plan. John feels that he can apply what he learnt about managing his conditions, deciding he was happy with his current level of ongoing support. His RCP episode ceases and his ongoing Support at Home services continue.

6.2.2. Expectation setting

Expectation setting is an important part of ensuring restorative care is successful and helps ensure people receive the care they need. Assessors should ensure the roles, responsibilities and objectives of RCP are fully explained during the assessment (including in comparison to ongoing care). This should happen before the RCP is recommended to ensure the older person fully understands the support that will be

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available to them and their role. Older people who do not have the capacity or the willingness to engage with the RCP should not be recommended and approved for it.

For older people new to the aged care system and who are not receiving aged care services:

- an ongoing Support at Home or CHSP classification cannot be recommended at the same time as the RCP.
- the RCP is not a mechanism to access urgent services.

For older people who are receiving aged care services through an ongoing classification:

- The RCP can be recommended and approved where eligibility criteria **are** met.
  - Assessors must consider the potential for functional improvement that would delay the need for a higher-level classification when approving RCP (as a higher ongoing Support at Home classification cannot be recommended at the same time).
  - The RCP is not a mechanism to provide additional funding to supplement ongoing services.

- If, through a reassessment, the IAT outcome is a higher ongoing classification, assessors will only be able to select the higher ongoing classification OR the RCP.
  - If the RCP is selected, the person will remain on their current ongoing classification (rather than the higher classification recommended).

- Assessors should consider if the older person's current provider delivers the RCP.
  - Under Support at Home, services must be delivered by a single provider (service delivery branch level). If the provider does not deliver the RCP, the participant will need to change providers to access both RCP and ongoing services. This should be considered before approving the RCP for people already accessing ongoing services through Support at Home.

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For those already accessing ongoing care, assessors should carefully consider ongoing needs before recommending the RCP. Assessors cannot recommend a new higher classification and the RCP at assessment. This will impact a new ongoing Support at Home classification entry into the Priority System.

For new participants, eligibility for ongoing services will need to be determined at the end of the RCP episode (if RCP is recommended).

6.2.3. Recommending Restorative Care Pathway in the assessor portal

Upon finalisation of the IAT, if the IAT outcome recommends an ongoing Support at Home classification, this can be overridden to change the IAT outcome to the RCP by clicking the override button. By overriding to the RCP, assessors will be navigated to the '*Add Home Support Services*' page to add services.

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Note:

Older people approved for the RCP can only access services they have been approved for.

Assessors should consider what services are being accessed under the person's ongoing Support at Home classification and ensure they are complementary (and be based on need connected to their restorative care approval). Assessors should note that delivery of multidisciplinary intensive allied health/nursing services is a key element of the RCP.

Restorative care management is also a mandatory service type when undertaking the RCP. To search for a RCP provider, people can search for the service type 'restorative care management' through the 'Find a Provider' website (when 'Support at Home program' is selected.

Note: Hoarding and Squalor services cannot be recommended alongside a recommendation for the Restorative Care Pathway.

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6.2.4. Interactions with other programs

Table 25. Restorative Care Pathway interaction with other programs

Program	Interaction with Restorative Care Pathway (RCP)
Ongoing Support at Home	If an older person receives an ongoing Support at Home classification through the IAT, this can be overridden to recommend the RCP. An approval for an ongoing Support at Home classification will cease an active RCP episode.
Assistive Technology and Home Modifications (AT HM) scheme	Older people approved for the RCP may also require Assistive Technology or Home Modifications to support good restorative care outcomes. Assessors must always ensure these needs are considered when approving the RCP. Older people who are approved for the RCP are eligible to receive an Assistive Technology low, medium and high funding tier, and low and medium tier **home modifications**. Participants with an ongoing Support at Home classification who are already have high

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Program	Interaction with Restorative Care Pathway (RCP)
	tier home modifications funding can keep this approval, noting this approval is connected to their ongoing classification approval. The assessor will need to select assistive technology and home modifications for these to be added to the support plan.
CHSP	Though the IAT will allow a CHSP classification to be overridden to RCP during a comprehensive assessment, an assessor must **not** recommend or approve the RCP for: • an older person new to the aged care system and not receiving aged care services, who is recommended CHSP by the IAT outcome; or • an older person already accessing CHSP, who is recommended CHSP by the IAT outcome. (Noting, where a CHSP classification outcome is generated, RCP cannot be recommended for approval (in line with section 81-15 of the Aged Care Rules.) If an older person accessing CHSP is recommended an ongoing Support at Home classification through a reassessment using the IAT, this can be overridden to recommend the Restorative Care Pathway. Note: Older people can access allied health and therapy services through CHSP. Assessors can recommend reablement and/or allied health and therapy services on their support plan
End of Life Pathway (or if they have recently accessed this pathway) Transition Care Program Permanent Residential Care	Cannot receive the Restorative Care Pathway at the same time (applicable for EoL, TCP and permanent Residential Care).

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6.2.5. Lapse in Restorative Care Pathway access

Access to the Restorative Care Pathway (RCP) will lapse if:

- the older person's episode of RCP ends (maximum 16 weeks); or
- a person does not enter into an agreement with a provider to deliver the RCP before the access code expires (within 56 days of approval with a further 28 days if My Aged Care is contacted for an extension).
- an assessor delegate approves an ongoing Support at Home classification (including higher ongoing Support at Home classification) while the person is still accessing the Restorative Care Pathway.

Note: Assessors should check if the older person is accessing the RCP and ensure the older person is aware approval for an ongoing Support at Home classification will end their RCP episode.

An older person will need to be reassessed if they wish to access the RCP after their access period ends lapses (with a 90 day break applied).

6.2.6. Manual oversight of Restorative Care Pathway places

RCP places are capped at 20,000 units per year across Australia, managed as around 5,000 units per quarter. From 1 November 2025, system-based visibility of RCP units will not be available. As a result, there will be no in-system prompts or controls to prevent the approval of RCP funding units beyond the quarterly caps. Twice-weekly reports of approvals made will be generated, allowing the Department to monitor RCP approvals and communicate with assessment organisations when approvals approach or exceed the assigned caps.

In addition to RCP approvals confirmed after 1 November 2025, those with an active Short-Term Restorative Care (STRC) approval (who did not start STRC before 1 November 2025), will have their approvals transferred into an approval for RCP.

Note for this cohort using their STRC approval to access the RCP:

- This cohort will also be accessing the RCP units of funding for the first six months from 1 November 2025.
- A second unit of funding to use within a single RCP episode can be requested via a Support Plan Review (SPR) request. However, assessors will need to self-refer this for reassessment to grant access to a second unit of funding. This is because the ability to add a second unit via SPR will not be available on the assessor portal for those with an STRC approval.
    - The reassessment can be done over the phone and does not require queuing for a face-to-face assessment.
    - The decision to approve a second unit will be informed by evidence submitted by the provider with the SPR request.
    - Availability of RCP funding units may also be considered.
- When a request for a second unit of RCP is received assessors should confirm if there is approval for STRC and RCP on the client's record. If there is approval for both, the assessor will need to confirm with the client if the client entered care

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under the RCP after 1 November 2025 using the STRC approval. If this is the case, then the assessor must not approve a third unit of RCP funding.
- If the participant is eligible to access an additional RCP unit they must wait at least 12 months before accessing another episode.

Assessors will need to remain acutely aware of any communication from the department regarding RCP caps to ensure you are making informed decisions. These communications will be the **primary tool** for identifying when RCP units are nearing exhaustion. Being responsive to these insights is essential for maintaining compliance with pathway limits and avoiding over-allocation.

Before recommending the RCP for approval, assessors should consider whether other service types—such as other Support at Home services or reablement options under the Commonwealth Home Support Program (CHSP)—could provide an equivalent level of support. This ensures that recommendations for approval are appropriate to an individual's needs, consider if a place will be available for the older person to access, and aligned with the sustainable allocation of places.

If a RCP recommendation is not made due to no places being available for allocation, the assessor should consider discussing with the older person alternative supports for recommendation. Assessors may also consider if an alternative classification could be recommended to meet the care needs of the individual.

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6.2.7. Restorative care funding

The RCP provides around $6,000 of funding, for up to 16 weeks. The total amount of funding a participant uses and length of time to complete an episode can differ. Restorative care partners will consider this when developing the goal plan.

At times, participants with higher needs may require additional funding over and above the $6,000 allocated per episode. If the participant requires additional funding within a single 16-week episode, the provider can submit a request for a Support Plan Review. If certain circumstances are met, approval can be given for the additional $6,000 in funds to support the episode (see Chapter 10 on Support Plan Reviews).

If approved, a participant can access an additional unit of funding (up to $6,000), to provide a combined total of up to $12,000, for a single RCP episode. If additional funding is approved, a participant will not be eligible for a further episode of RCP within a 12-month period as they have accessed the maximum 2 units of funding within the first episode.

The decision to approve additional funding to the RCP episode is made under *subsection 195-3 of the Rules*. It is a non-reviewable decision. The criteria in the Rules includes that required evidence must be given by the participant's provider and there must be units of funding available for approval.

Evidence to support the additional funding may include:

- Goal plan and individualised budget outlining how the required clinical interventions are not supported by the initial funding
- Information as to why ongoing funding cannot be used to complement restorative care clinical goals.

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The assessment delegate must send a letter to the older person (and their registered supporter/s, if required under the Act) notifying them of the outcome of the application for the additional funding. The assessment delegate should choose the appropriate template under 'Reports and documents' > 'Forms' in the Assessor Portal.

Note:
This is a different template to the Notice of Decision issues for other approval decisions.

6.2.8. Restorative Care Pathway and the Support at Home Priority System

The Restorative Care Pathway (RCP) is not subject to the Support at Home Priority System. People can access RCP once a Notice of Decision letter has been received after delegate approval. Please note that selecting the RCP will mean that any new ongoing or higher ongoing Support at Home classifications cannot be selected. As such, assessors should consider long term need when approving for the RCP. An assessor may only select an ongoing (or new ongoing) Support at Home classification which will put them in the Priority system OR select RCP.

RCP participants will have immediate access to any recommended assistive technology and home modifications under the AT-HM scheme based on their assessed needs.

6.2.9. Hospitalisation, residential respite and leave

People may need to enter hospital or residential respite while accessing the RCP. There are no leave provisions under Support at Home. If a person's RCP episode finishes while they are in hospital or residential respite, they will need to consider reassessment to determine what will meet their needs.

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6.3. Support at Home - End-of-Life Pathway

The End-of-Life Pathway is one of the short-term home support classifications under the Support at Home program. A participant can access one episode of the End-of-Life Pathway. A total of $25,000 is available per eligible participant over a 12-week period. This is the highest funding classification category (per day) available in the Support at Home program.

An older person is eligible to access this pathway if they meet the following criteria:

- A doctor or nurse practitioner advises an estimated life expectancy of 3 months or less to live
- Australian-modified Karnofsky Performance Status (AKPS) score (mobility/frailty indicator) of 40 or less.

Funding can be used to access the participant's approved services from the Home Support service list, including care management.

6.3.1. End-of-Life Pathway form

The End-of-Life Pathway form is used to document the required medical evidence for accessing the End-of-Life Pathway under the Support at Home program. An individual seeking access to the End-of-Life Pathway must complete all relevant sections and present this form to a medical practitioner or nurse practitioner for completion. The completed form should then be submitted as part of the assessment process—either before or during triage, or assessment—and reviewed to confirm eligibility for the End-of-Life Pathway.

Assessment delegates are responsible for verifying the completion of this form in the older person's record when the End-of-Life Pathway has been flagged in the My Aged Care assessor portal.

Reviewing the form will involve:

- Checking the individual's details to ensure they match the record in the portal.
- Verifying the completion of all areas of the Medical Assessment section to confirm:

    1. The individual has a prognosis of a life expectancy of three months or less, and
    2. An Australian-modified Karnofsky Performance Status (AKPS) score of 40 or less.
    3. Medical practitioner or nurse practitioner has completed and signed the form.

An individual will **not** be eligible for approval for the End-of-Life Pathway if the required criteria outlined in the medical assessment section are not met.

6.3.2. Accessing the End-of-Life Pathway

Existing Support at Home participants can access End-of-Life Pathway through a **Support Plan Review.** This is usually requested through the My Aged Care Service and Support Portal by the older person's provider and should be made using the approved form.

Older people can seek a referral through their medical practitioner or other health professional (using the Make a Referral or GP e-referral channels) or by contacting the My

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Aged Care contact centre or using Apply Online. The End-of-Life Pathway form must be attached for referrals using Make a Referral or GP e-referral. For other entry pathways, Triage is still able to be undertaken without a completed End-of-Life Pathway Form. In these instances, participants should be advised at Triage to have the form completed by an appropriate medical practitioner (their GP, non-GP specialist or nurse practitioner.) The End-of-Life Pathway Form must be completed before the End-of-Life Pathway is approved.

Once approved, services are delivered under the End-of-Life Pathway classification and care partners work with any relevant state and territory palliative services to ensure care is appropriate and tailored to the individual's preferences and needs.

6.3.3. Interactions with other programs

Table 26. End-of-Life Pathway interactions with other programs

Program	Interaction with the End of Life Pathway
Assistive Technology and Home Modifications (AT HM) scheme	Individuals receiving support through the End-of-Life Pathway can be approved to access assistive technology (Tier 1 or 2 only) at the same time. If approved for assistive technology, immediate AT-HM scheme funding can also be used to access products and equipment from the AT-HM list. If eligible, primary supplements will also apply to participants. The assessor will need to select assistive technology for this to be added to the support plan. Access to home modifications is not permitted. If home modifications are already underway through the AT-HM scheme at the time the End-of-Life Pathway is approved, these modifications can continue while accessing the End-of-Life Pathway.
Residential Respite	Participants accessing the End-of-Life Pathway may continue to access these services during a period of Residential Respite, as long as services are not duplicative.
Transition Care Program	Participants accessing the End-of-Life Pathway are not eligible to receive transition care.
CHSP	Participants accessing the End-of-Life Pathway can access CHSP services, including urgent services, in limited circumstances. See Table 29 for more information.

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Program	Interaction with the End of Life Pathway
Support at Home ongoing	An individual cannot access these services under the End-of-Life Pathway
Restorative Care Pathway	
Permanent Residential Care	

If an individual is eligible for the End-of-Life Pathway, they can be referred and transitioned out of any of the above programs to begin receiving services under the End-of-Life Pathway. Individuals who are accessing services through MPSP or NATSIFACP, can access their SAH End-of-Life approval through those programs as well. Participants accessing the End-of-Life Pathway may continue to access these services during a period of Residential Respite, as long as services are not duplicative.

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6.3.4. Funding for the End-of-Life Pathway

Funding for the End-of-Life Pathway is discrete from other Support at Home classifications. If an existing Support at Home participant moves to the End-of-Life Pathway, this will replace their ongoing Support at Home classification.

Unlike an ongoing classification, participants cannot accrue funds under the End-of-Life Pathway. This means that any unspent budget from an End-of-Life Pathway classification will not follow a participant if they live beyond the End-of-Life funding period and move to an ongoing classification.

Transitioned HCP clients can access the End-of-Life Pathway via an SPR, like all existing Support at Home participants. If they require services beyond the End-of-Life Pathway funding period, they can return to their previous transitional classification via an SPR.

6.3.5. Allocation of ongoing Support at Home to the client after End-of-Life Pathway

If the participant requires ongoing Support at Home services following the completion of the End-of-Life Pathway, the following will apply:

Participants who were accessing ongoing Support at Home services prior to accessing the End-of-Life Pathway can be transferred to their previous Support at Home classification via an urgent Support Plan Review.

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Participants who were new to Support at Home when they commenced the End-of-Life Pathway can be transferred to the inactive classification that was assigned at their aged care assessment, via an urgent Support Plan Review.

6.3.6. Assessing for End-of-Life Pathway

When assessing for the End-of-Life Pathway, only mandatory questions that are required to run the IAT Outcome and generate an ongoing Support at Home classification are required to be completed. This is to ensure the older person has a valid classification to return to if they need services beyond the End-of-Life Pathway funding period. Other questions are optional based on the individual's needs and context.

6.3.7. Recommending the End-of-Life Pathway in the assessor portal

Assessors can select the End-of-Life Pathway for older people under the '*Goals & recommendations'* tab within the Support Plan and services section of the My Aged Care Assessor Portal. It is best practice for End-of-Life to be flagged and verified prior to the commencement of the assessment, however there are allowances to be able to complete these two tasks after an assessment has started.

Upon finalising the IAT, the system will recommend either a single CHSP classification or an ongoing Support at Home classification (in nearly all instances, it will be a Support at Home classification for this cohort). If a Support at Home classification is generated, assessors will need to override the recommendation and choose 'End-of-Life'. Assessors will be navigated to the 'Add Home Support Services' page where services are pre-selected. Assessors should only unselect service sub types if they think the client may not have a need for this service.

This will then enable assessors to allocate this pathway for assessment delegate approval.

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6.4. Support at Home – Assistive Technology and Home Modifications (AT-HM) scheme

The Assistive Technology and Home Modification (AT-HM) scheme is a short-term pathway that supports older people to live at home and within their community with increased independence, safety, accessibility and wellbeing. The AT-HM scheme provides separate supports under Support at Home, with separate funding tiers (called *classification levels* under the Act) and program settings. Participants can access both assistive technology and home modifications funding tiers at the same time if needed. This will provide upfront funding to access products, equipment and home modifications. The AT-HM scheme is delivered in parallel to a participant accessing ongoing services through Support at Home. This means that participants can access these supports without needing to save up funds from their Support at Home quarterly budgets for ongoing services.

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6.4.1. AT-HM scheme participants

AT-HM scheme participants are empowered to actively participate in informed decision-making regarding the care, products, equipment and home modifications they receive. Providers are expected to consult participants to determine their support needs to ensure services are individualised and relevant.

Through the AT-HM scheme, participants will:

- have access to the AT-HM list to understand what equipment, products and home modifications are available to meet their assessed need,
- actively participate in the care planning process and have the AT-HM scheme explained in a way that they understand,
- identify their needs, life goals, strengths, and service delivery preferences including choice of health professionals,

6.4.2. Assistive technology

Assistive technology (AT) is any item, piece of equipment or product that is used to help an older person do things more easily or complete activities they can no longer do independently.

Examples of assistive technology include:

- mobility equipment such as walking sticks, walking frames and wheelchairs
- toileting supports including bedpans and commodes
- bathing devices including shower chairs and bath boards
- alternative and augmentative communication (AAC) products
- products for food preparation and eating including adaptive cutting boards and knives, as well as modified cutlery
- costs associated with assistance dog maintenance.

The AT-HM scheme does not include items such as:

- everyday household appliances e.g., a dishwasher
- assessment or therapy tools used by a therapist
- products or technologies funded through an alternative national or state-based program (e.g., the Medical Aids Subsidy Scheme).

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Assistive Technology and Home Modifications list (AT-HM list)

6.4.3. Home modifications

Home modifications (HM) provide changes to an older person's home to create a home environment that is safer and more accessible, so they can remain living safely at home.

Examples of home modifications include:

- lever tap sets or lever door handles

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- grab rails in the shower or bathroom
- internal and external handrails
- modified door locks
- non-slip materials and surfaces for floors and stairs.

In some circumstances, participants may be approved for more significant home modifications including:

- bathroom modification (e.g., level access shower and modifications to improve accessibility)
- ramps and stairlifts.

The AT-HM scheme does not include:

- general renovations to a home or dwelling
- restorations or repairs which are considered normal maintenance of home or dwelling
- changes to a home layout that do not relate to a participant's support needs.
- AT-HM funding tiers.

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6.4.4. Funding tiers for AT-HM

The table below outlines the 3 funding tiers for assistive technology and home modifications.

Table 27. AT-HM funding tiers

Funding tier	Funding allocation cap	Funding period
Assistive technology		
Low	$500	12 months
Medium	$2,000	12 months
High	$15,000[1] (nominal)	12 months
[1] Products and equipment with costs greater than $15,000 are available to participants with a prescribed need.		
Home modifications		
Low	$500	12 months
Medium	$2,000	12 months
High	$15,000	12 months[2]
[2] Funding may be extended for an additional 12 months to complete complex home modifications (24 months in total) if evidence is provided to Services Australia		
Other funding		
Assistance dog maintenance	$2,000 per year	Ongoing[3]
[3] Funding for assistance dog maintenance will be automatically allocated every 12 months; however, the funding cannot accrue or rollover.		

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This funding may cover the following:

- Assistive technology equipment and products
- Repairs or maintenance of assistive technology items available on the AT-HM list
- Prescription of items, where appropriate, by a suitably qualified health professional working within their professional scope of practice
- Associated administration activities (cap will apply – see the AT-HM scheme guidelines for further details).

Participants will be allocated a funding tier for 12 months (in most cases) to spend their assistive technology and home modifications funding.

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The cost of wrap-around services—such as delivery, setup, training, and follow-up—are also drawn from the AT-HM funding tier. Providers can add a 10% charge on administration costs for AT claims and a 15% charge for coordination costs for HM claims. Assessors must consider these costs when allocating a funding tier.

Participants may be required to contribute towards their assistive technology or home modifications.

AT-HM funds will not accrue over time and funding will be available for 12 months once a participant is assessed (or reassessed) and approved. If major home modifications take longer than 12 months, funding may be available for a further 12 months if the participant can provide evidence the work has commenced. This will ensure enough time to complete the work to the required standards.

Older people identified at assessment with specific progressive conditions may be eligible to access assistive technology funding for 24 months to meet their rapidly changing needs. The 13 conditions listed below are all eligible AT-HM progressive conditions under Support at Home.

These conditions are:

- Cerebral Palsy
- Epilepsy
- Huntington's Disease
- Motor Neurone Disease (MND) noting different phenotypes require different management
- Multiple Sclerosis (MS)
- Parkinson's Disease
- Late effects of Polio
- Spinal Cord Injury
- Spinal Muscular Atrophy
- Stroke
- Acquired Brain Injury noting different types of brain injury require different management
- Muscular Dystrophies and Muscular Atrophies.

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In some cases, this funding can be extended for another 24 months, providing a total of 48 months of support. If available, Home Care Package unspent funds must be used to access assistive technology and home modifications before AT-HM scheme funding is used.

6.4.5. AT-HM list

The AT-HM list sets out the assistive technology and home modifications that can be accessed and funded through the AT-HM scheme.

The AT-HM list is sorted into the following categories:

- managing body functions – including pressure cushions, anti-oedema stockings and memory support products
- self-care products – including adaptive clothing or shoes and assistive products for toileting, bathing and showering
- mobility products – including walking frames, wheelchairs and lifting devices
- domestic life products – including assistive products for food preparation, eating, drinking and house cleaning

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- communication and information management products – products and equipment that assist with reading and writing, as well as alternative and augmentative communication (AAC) devices
- home modifications - including accessible showers, grabrails, fixed ramps and safety barriers.

The AT-HM list also outlines the recommended prescription category for each item. The prescription category is the suggested level of skill or qualification required to effectively provide recommendations for the safe and effective use of assistive products or equipment or installation of home modifications.

Assistive Technology and Home Modifications list (AT-HM list)

6.4.6. Assessing for the AT-HM scheme

Existing questions in the IAT will help to identify and determine an older person's need for assistive technology and home modifications. The AT-HM tier guide will assist the assessor to make a funding tier recommendation. For example, the function section will provide a more detailed understanding of a client's functional ability, their ability to complete activities of daily living, and if the client requires further assistance with these.

Assessors are **not required** to determine the exact item or product to be provided. Rather, an assessor's role is to identify whether the person is likely to benefit from AT or HM supports based on observed and reported difficulties, risks, or goals. Assessors are asked to assign a funding tier for AT and HM based on the assessed need with the support of the AT-HM tier guide. It is recommended that assessors also familiarise themselves with the AT-HM list and how it is utilised in the AT-HM scheme. The specific types of AT-HM best suited to the client, and any required prescriptions, is the responsibility of the registered provider at the point of service delivery.

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During the assessment, consider whether the older person:

- has needs and goals that could be met through using assistive technology and home modifications
- can have those needs met through the products, equipment and home modifications included on the AT-HM list.
- may require prescription or wraparound services for the assessed needs of the assistive technology and home modifications. This will need to be considered and captured under the recommended funding tier allocation.

6.4.7. AT-HM funding tier guide

If assessors identify that the older person requires AT-HM they are required to recommend a funding tier. AT-HM funding tier guidance has been developed to assist assessors to make a funding tier recommendation for AT and HM based on the older person's assessed need in the IAT. This includes considering their current functional ability and home environment.

The guidance has been designed to consolidate the main elements of the IAT relevant to AT-HM and support assessors in choosing a funding tier. The guide will suggest an

assessment tier which should sit where the majority of tier indicators have been selected. The guide groups indicators into three tiers: **Tier 1 (low), Tier 2 (medium), and Tier 3 (high)**—and uses a checkbox format for ease of completion. The AT-HM tier guide provides a non-scored pattern of recommendation—the more indicators selected within a particular tier, the stronger the alignment with that level of support.

Where the guide does not produce a clear outcome, or in more complex cases, clinical reasoning based on the person's functional ability, safety, independence, and home environment should guide the tier allocation. Progressive conditions—particularly if multiple are present—may also justify a higher tier allocation (e.g. Tier 3), even if fewer indicators are ticked.

Assessors should ensure their recommendations align with the participant's goals, safety, independence, and overall ability to remain living at home. They may choose to select an alternate tier if funding does not align with assessed need. Assessors can upload the document as an attachment to allow the assessment delegate to review as supporting evidence for any funding tier recommendations made.

Note:

Assessment operation managers will have access to the AT-HM tier guide document on the assessor SharePoint site. Operation managers can download and provide the template to assessors.

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6.4.8. Instructions for assessors completing the AT-HM Tier Guide

The AT-HM Tier Guide should be used by assessors and assessment delegates to determine the appropriate funding tier for an older person who has been assessed as having a need for AT and/or HM.

Assessors are asked to complete the following:

- use the relevant information from the older person's assessment when completing the AT and HM tier guide
- select the relevant indicators on the tier guide for either AT and HM based on the older person's assessed need
- review the guide to support tier allocation recommendation. The AT-HM tier guide will suggest a tier where the highest number of tier indicators have been selected.
- upload the completed AT-HM tier guide to the assessor portal under 'other' and title the document 'AT-HM Tier Guide'. The Assessment Delegate should consider the guide when approving or declining the AT-HM funding tier.
- manually add the recommended AT and HM tier in the support plan once a funding tier is determined.

Assessment decisions for AT-HM funding tier allocation can be reviewed through a Support Plan Review if the funding tier does not cover the assessed need.

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CASE STUDY: AT Tier 1 (low tier)

Carol is 65 and has just been assessed and during her comprehensive assessment it was found that she is managing daily activities independently but would benefit from some help with housework and getting to and from the shops. She mentioned that she has some difficulty washing her legs, feet and back in the shower and finds it hard to bend down to put her shoes on.

The assessor thinks Carol may benefit from some basic items such as a long-handled sponge, a non-slip bathmat and a long-handled shoehorn. After looking at the AT-HM list the assessor believes that all these items are low-cost and low risk and Carol should be allocated Assistive Technology Tier 1 (AT low tier) funding to cover the cost of these items.

Using the assessment findings the assessor completes the assistive technology section of the AT-HM tier guide. All selected indicators sit within Tier 1. The assessor allocates Carol with an Assistive Technology Tier 1 (AT low tier) on the support plan. This decision is supported by the information gained during the assessment and the AT-HM tier guide recommendation.

The assessor uploads the AT-HM tier guide to the assessor portal under 'other' naming the document 'AT-HM tier guide'. This is considered by the delegate as supporting evidence of AT-HM tier recommendation.

Carol's AT recommendation is sent to the assessment delegate for approval. If approved by the assessor delegate, Carol will receive a Notice of Decision letter informing her that she has been approved for a SaH on-going classification and Tier 1 (AT low tier) funding for assistive technology. Once funding is assigned, she can then find a provider to help source the low-cost and low risk AT items she needs.

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CASE STUDY: HM Tier 3 (high tier)

David is 55 and lives in a small rural community in Western Queensland. He attends an Elders' social group at his local Aboriginal Community Controlled Organisation (ACCO). The ACCO's Elder Care Support worker supported David during an aged care needs assessment conducted by an Aboriginal and Torres Strait Islander assessment organisation. David has just been assessed. During David's assessment he explained that he would like to be able to come and go from his home more easily so he can do things for himself like shopping. During the subsequent discussion, the assessor noted that David has significant issues managing at home safely due to his home environment. He lives alone and is not able to easily enter or exit his house because of the steep front stairs and difficulties carrying his walking frame on the stairs.

After spending time with David to build his trust and understanding of the assessment process, David explained he feared falling when entering and exiting his shower due to a large step into his shower recess. David's son helps him when he can, but he lives in another town and can only visit a couple of times a week.

The assessor and Elder Care Support worker identify in the AT-HM list that David could benefit from some modifications to his home which could include a ramp or railings at the front and modifications to his bathroom. David agrees with this assessment. The assessor completes the tier guide, and the indicators show mostly in the high tier, with some also in the medium tier. As it is likely he will need major modifications to his front access or bathroom, the assessor recommends a Tier 3 funding tier for HM (HM high tier).

The assessor uploads the AT-HM tier guide to the assessor portal under 'other' naming the document 'AT-HM tier guide'. This is considered by the delegate as supporting evidence of AT-HM tier recommendation.

David's HM tier recommendation is sent to the assessment delegate for approval. If approved by the assessor delegate, David will receive a Notice of Decision letter informing him that he has approval for a SaH on-going classification and Tier 3 approval for home modifications (HM high tier). Once funding is assigned, he can then find a provider to help source the prescriber and home modifications he needs. The Elder Care Support worker can assist David with this process. When this is explained to David, he says he is excited to think about being able to do shopping and other tasks for himself whenever he needs to. He is also glad this will take some of the pressure off his son.

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CASE STUDY: Progressive Condition

Margaret is 68 and was assessed at home to increase Support at Home services as she is not managing with her current allocation. The assessor reviews her medical history and finds that she suffered a stroke 5 years ago which left her with left sided weakness. Recently she has found it much harder to manage at home, she cannot get up and down the stairs by herself and her family report she is unsteady when walking around her home. She lives with her son and daughter-in-law but does not like being reliant on them for daily tasks. As Stroke is one of the identified AT-HM progressive conditions, the assessor selects it in the health condition section of the assessment. The assessor thinks that Margaret may benefit from a range of assistive technology and home modifications to support her current needs and as her condition declines. She will require assessment and prescription from a suitably qualified health professional to determine her AT and HM needs.

The assessor fills out the AT-HM tier guide which indicates a Tier 3 (AT high tier) for assistive technology and a tier 2 for HM (HM medium tier), this aligns with the complex needs identified at assessment. The assessor recommends a SaH on-going classification and allocates tier 3 for AT (AT high tier) and tier 2 for HM (HM medium tier) in the support plan. Margaret will have access to her AT funding allocation for 24 months and this can be further extended to 48 months if needed, as she has an identified progressive condition.

The assessor uploads the AT-HM tier guide to the assessor portal under ‘other’ naming the document ‘AT-HM tier guide’. This is considered by the delegate as supporting evidence of AT-HM tier recommendation.

Margaret’s AT-HM tier recommendation is sent to the assessment delegate for approval. If approved by the assessor delegate Margaret will receive a Notice of Decision letter informing her of her new SaH on-going classification and AT-HM funding. She has been recommended AT Tier 3 (AT high tier) and HM Tier 2 (HM medium tier) funding approval and once funding has been assigned, she can then find a provider to help source the prescriber, assistive technology and home modifications she needs.

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6.4.9. Recommending AT-HM tiers in the assessor portal

The option to recommend an AT and HM funding tier will be available for those who have recommended ongoing Support at Home classification. The Restorative Care pathway and End-of-Life Pathway will display the AT and HM funding tier options that apply to that pathway.

Assistive technology

- **Short-term classification** should be selected if AT is recommended for all AT needs other than assistance dogs.
- **Ongoing classification** should be selected if AT is recommended for assistance dogs.

Assistance dogs

If a participant is not eligible or is unable to access the Physical Assistance Dogs Program, costs associated with essential assistance dog maintenance may be included under the AT-HM scheme where the services directly relate to the upkeep of the dog.

A dog must meet the definition of an assistance dog used by Health Direct and be required to enable participation in activities of domestic life.

Funding for assistance dogs is capped at $2,000 per annum for ongoing maintenance of the assistance dogs e.g., paying veterinary bills, animal vaccinations, deworming and flea treatments, essential grooming and dog food.

Participants requiring assistance dogs will be identified and approved for funding through their aged care assessment. Funding for assistance dogs is a specific need, with separate funding for this purpose. If the participant no longer requires this specific funding, the provider must notify Services Australia through the Services Australia Aged Care Provider Portal.

If an older person has an assistance dog, the assessor will need to identify this in the free text box under ‘Sensory concerns’ in the Physical, Personal Health and Frailty domain of the IAT.

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Home modifications

By clicking the ‘Recommend a Home Modification’ button you will navigate to the Add Home Modification recommendation’ page. On this page you must select an HM tier.

If the recommended classification is Support at Home Restorative Care Pathway, then only Medium and Low Tier will be available.

If there are concerns and goals on the older person’s support plan, the option to link goals will be available.

Service type and services will be pre-selected and read-only.

6.4.10. AT-HM Scheme Priority System

The AT-HM scheme has a separate priority system to the Support at Home Priority System. The AT-HM scheme has an Assistive Technology Priority System and a Home Modifications

Priority System that allocate AT-HM scheme funding. An older person assessed as eligible for AT and HM will enter the AT-HM Priority Systems in one of its four priority categories (immediate, high, medium or standard). The older person will not be able to access AT-HM under Support at Home until funding has been allocated. The amount of time they wait for services will depend on the priority category they are in.

The AT-HM Priority Systems ensure the equitable allocation of funding based on standardised criteria determined using information collected by an assessor through the IAT. This is used to calculate the priority category which is generated by the system. The assessor is not required to choose the priority category.

The following criteria are used. The individual/'s:

1. lives alone
2. has an assessed severe mobility impairment
3. is an Aboriginal or Torres Strait Islander person
4. current place of residence poses a severe risk to their health or safety
5. has waited more than 6 months from initial referral and resides in a rural or remote area categorised under MM5-7

Older people actively seeking AT-HM at the time of their approval will be automatically placed in the AT and HM Priority System and set as 'seeking services'.

Note: Participants assigned to the Restorative Care Pathway or the End-of-Life Pathway who have an assessed need for AT and HM will be allocated AT-HM funding immediately once approved by the assessment delegate. Note that the system will display an AT-HM priority of 'High' in this scenario, however the funds are allocated immediately. Further information will be available in the AT-HM scheme guidelines.

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6.4.11. Interactions with other programs

Table 27. AT-HM Scheme interactions with other programs

Program	Interaction with the AT HM scheme
Support at Home ongoing	Can access funding through the AT-HM scheme at the same time.
Restorative Care Pathway	Older people accessing the Restorative Care Pathway can access: • Assistive technology: low, medium and high tiers • Home modifications: low and medium tiers
End of Life Pathway	Older people accessing the End-of-Life Pathway can access: Assistive technology: low and medium tiers

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Program	Interaction with the AT HM scheme
Residential Respite	Can receive AT-HM in their home while in respite
Transition Care Program	TCP clients who have an on-going Support at Home classification will be eligible for the AT-HM scheme under Support at Home. TCP clients who are *not* currently on a Support at Home package will be able to access AT through TCP.
CHSP	Participants who are not eligible for Support at Home that require low level on-going services as well as assistive technology and/or home modifications will receive a CHSP classification. These services will be delivered under a CHSP AT and/or HM classification.
Permanent Residential Care	Cannot access AT-HM

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6.5. Commonwealth Home Support Program (CHSP)

From 1 November 2025 the CHSP comes under the *Aged Care Act 2024* and there will be changes to the way that CHSP services are regulated and delivered. This means the types of services delivered must only be provided to older people who are eligible and have had their care needs assessed care. The CHSP service catalogue 2025-2027 details the services an eligible person can receive under CHSP. CHSP will be transitioned into the Support at Home Program no earlier than 2027.

The service list for CHSP has changed and been updated for delivery of services in the period between 2025 and 2027. See the below service catalogue for further information.

The CHSP is a grant funded program which provides entry-level support to help older people continue to live safely and independently at home and in their communities. It is available to people who meet the eligibility requirements under section 58 of the *Aged Care Act 2024*. The CHSP is suitable for people who can live independently at home but need small amounts of support to do so.

The CHSP is not designed for people with intensive or complex care needs. People with higher needs are supported through other aged care programs such as the Support at Home program or residential aged care.

CHSP service catalogue 2025-2027

Commonwealth Home Support Program (CHSP) 2025–27 Manual (from 1 November 2025) | Australian Government Department of Health, Disability and Ageing

6.5.1. Care Finder program and Elder Care Support program participants

Clients in the Care Finder program and Elder Care Support program may be eligible for CHSP services that help to avoid homelessness or reduce the impact of homelessness. To access these CHSP services, clients must be meet the eligibility requirements under section 58 of the *Aged Care Act 2024*.

Elder Care Support program

Care Finders program

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6.5.2. Access to CHSP services

From 1 November 2025 anyone seeking CHSP services will require an aged care needs assessment. This means providers must ensure:

- All clients are recorded in My Aged Care with a My Aged Care ID, **and**
- Clients have a care plan recorded in My Aged Care, which describes the client's assessed care need.

6.5.3. Assessing for and recommending CHSP

- Once the assessment has been finalised, based on the information entered into the IAT, the My Aged Care assessor portal or Aged Care Assessor App will indicate whether the client requires CHSP or Support at Home (SAH) services.
- If CHSP is recommended by the IAT Outcome, the assessor will proceed to recommend a set of services within the CHSP category.
- When assessors recommend temporary-urgent services or periods of time-limited reablement under CHSP, they are encouraged to record any additional information about the client's situation in the assessment summary, as comments entered in the My Aged Care assessor portal will not appear on the Support Plan. For example "client needs time-limited transport services until 28 February 2026 to purchase groceries/attend medical appointments, as they are unable to drive while recovering from acute episode/surgery".
- If the CHSP episode is ongoing, the recommendation should explain why ongoing services are needed for the client (e.g., 'due to an ongoing health condition'). Ensure the explanation is justified, well-evidenced and consistent with the 2025 – 2027 CHSP Manual.

- In some circumstances, existing CHSP clients may need to contact My Aged Care and be referred for an assessment or reassessment to continue receiving services. This includes:
    - A client's needs can change, such as a need for a new service type or a significant increase to support needs. As part of their re-assessment, the client may be assessed as eligible for continuing care through CHSP or may be assessed as eligible for Support at Home.
    - There are some existing CHSP clients who have never been assessed. This includes clients who have been 'grandfathered' into the CHSP from previous programs. From 1 November, it is a requirement for all of these clients to be referred for an assessment, even if they are already accessing CHSP services.

Note: From 1 November, a key process change is that assessors should not issue CHSP referral codes until *after* the assessment delegate has approved the recommendation. This is because all CHSP services will require assessment delegate approval as of 1 November 2025.

6.5.4. Hoarding & squalor assistance

Hoarding and squalor assistance aims to support older people or prematurely aged people who are living with hoarding behaviour or in a squalid environment who are at risk of homelessness or unable to receive the aged care supports they need.

Eligibility

Frail older or prematurely aged people who meet the following 3 criteria:

1. on a low income
2. living with hoarding behaviour and/or in a squalid living environment
3. at risk of homelessness or unable to receive the aged care services they need.

Prematurely aged people are those aged 50 years and over whose life course such as active military service, homelessness or substance abuse, has seen them age prematurely.

Note:

From 1 November 2025, new clients that are Aboriginal and Torres Strait Islander people who are 45-49 years old are no longer eligible to access Hoarding and Squalor assistance.

Older people who are eligible to access hoarding and squalor assistance, remain eligible for this service indefinitely and do not require a reassessment for hoarding and squalor assistance, even if they suspend services for several years. These older people are also eligible to access other CHSP services targeted at avoiding or reducing the impact of hoarding and squalor situations.

Assessment organisations are required to work collaboratively with hoarding and squalor assistance service providers in supporting older people to access aged care due to their particular circumstances. Hoarding and squalor assistance service providers link older people to the most appropriate range of housing and care services in order to meet their immediate and ongoing needs. The range of hoarding and squalor services may include:

- one-off clean-ups

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- developing a client plan and reviewing care plans
- linking to specialist support services.

It is recognised that a specialised approach is required for hoarding and squalor assistance clients due to their particular circumstances.

It is appropriate for aged care assessors to refer suitable clients identified during the assessment process to the hoarding and squalor assistance or care finders for further support.

Where there are significant changes in need or additional services needed, CHSP providers can request a Support Plan Review, which may lead to a reassessment.

Out-of-scope activities under this service type

- Assessment (referrals) and advocacy services (financial, legal), unless targeted at avoiding or reducing the impact of hoarding and squalor situations.
- Permanent support and/or direct care provision.
- Funding to purchase accommodation for clients.
- Hoarding and squalor clients are exempt from paying a client contribution towards their services.

6.5.5. Understanding AT and HM under CHSP

AT and HM services will continue to be available to eligible people under the CHSP. The relevant service types from the CHSP service catalogue are:

- Home adjustments: subsidised home modification services up to $15,000 per year.
- Equipment and products: subsidised low-cost assistive technology and products up to $1,000 per year.

To access these services eligible people will be approved for:

- the Home Support Service group with a classification level CHSP class, and
- the Assistive technology service group with a classification level of AT CHSP or
- the Home adjustment service group with a classification level of HM CHSP.

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Note:

There are not multiple funding tiers for AT CHSP and HM CHSP as there are under the Support at Home AT-HM scheme.

The Notice of Decision template (described in detail later) will prompt you to ensure the correct approvals are included.

CHSP service list for Equipment and products and Home adjustments from 1 November 2025:

Equipment and products

- Self-care products
- Mobility products
- Domestic life products
- Communication and information management products
- Managing body functions

Home adjustments

- Home modifications

6.5.6. Interactions between CHSP and other programs

There are limited circumstances where a person can access CHSP services in addition to other government funded services, detailed in tables 28 and 29 below.

Services should not be duplicative. For example, if a client has access to domestic assistance from the Veterans' Home Care Program, they cannot access Domestic assistance through the CHSP at the same time.

Table 28. Guide to approval for concurrent access to CHSP services with other government funded services

Program	Can participant access CHSP services?
Support at Home participants (including Restorative Care Pathway and End of Life Pathway)	There are four circumstances where a Support at Home participant can access additional services through the CHSP. These are: 1. Pre-existing CHSP social support group 2. Hoarding and Squalor 3. Cottage respite, Community and centre-based respite and Flexible respite 4. Emergency Access (see table 28 below for further detail).
Waiting for a Support at Home place allocation	The participant can access interim CHSP services. Interim CHSP services are also available for a participant who has been assessed as needing a higher Support at Home classification but are waiting for their increased budget. If a Support at Home participant declines to take up the classification, they can continue to access entry level CHSP services as a CHSP client. They will not access CHSP services to the level of the Support at Home classification they were approved for.

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Program	Can participant access CHSP services?
Existing Home Care Package recipients accessing top up CHSP services	Where the HCP recipient is accessing additional CHSP services in addition to their HCP, from 1 November they would transition to a Support at Home classification. The CHSP services would cease as they will be supported through the Support at Home program. If they need additional services through the CHSP, these would be on a full cost recovery basis, unless the limited circumstances listed in table 29 apply.
Residential Aged Care and Residential Respite Care	Individuals in Residential Aged Care cannot access Government-funded CHSP services. They may choose to access services on a full cost recovery basis.
Disability Support for Older Australians, National Disability Insurance Scheme (NDIS), NATSIFAC Program, Transitional Care Program (TCP) and Veterans' Home Care Program	Can access CHSP services, as long as they have a referral and there is no duplication of services.

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There are **limited** circumstances where a Support at Home participant can access CHSP services:

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Table 29. Circumstances when a Support at Home participant can access CHSP services

1. Pre existing CHSP social support group	Support at Home participants who have transitioned from the CHSP may continue to access their pre-existing CHSP social support group through the social support and community engagement service on an ongoing basis to allow the continuity of social relationships. This only applies to participants attending a pre-existing CHSP social support group service.
2. Hoarding and Squalor	Support at Home participants who are living with hoarding behaviour or in a squalid environment who are at risk of homelessness or unable to receive the aged care supports they need, may access Hoarding and squalor assistance through the CHSP (in addition to their Support at Home funding) through an assessment, if required.
3. Community and centre based respite, Flexible respite and Cottage respite	Support at Home participants may access additional planned respite services through the Home or community general respite service or Community cottage respite.
4. Emergency access	In emergency situations, where a Support at Home participant has an urgent and immediate health or safety need, and their individualised budget has been fully allocated or they are waiting for their budget, some additional CHSP services can be accessed on a short-term basis.

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6.5.7. Other CHSP services can be accessed at full cost recovery

Support at Home participants can choose to pay for additional CHSP services out of their quarterly Support at Home budget.

The participant must pay for the entire cost of services (known as full cost recovery). For example, if the Support at Home participant received meals from the CHSP, they would be charged the full cost of the meals, including ingredients, preparation and distribution costs.

The participant is only able to access CHSP services that are also on the Support at Home service list and included in their support plan.

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6.5.8. Recording the decision for CHSP service recommendations in the Notice of Decision

If the IAT Outcome is CHSP **only**, a Notice of Decision will **not** be automatically generated. Assessors will need to use an offline template for the Notice of Decision letter.

Assessment Delegates should review any CHSP service recommendations listed. If they disagree with any of them, they should contact the assessor to discuss and amend the list if required.

At the moment, Assessment Delegates are not able to record their agreement or disagreement alongside each CHSP service recommendation in the assessor portal. Their decision to agree with the recommended CHSP services must be recorded in the Notice of Decision. If approving the client for the CHSP classification only (that is, the Assessment Delegate is not approving any ongoing or short-term Support at Home classification), the My Aged Care Assessor Portal will not currently generate the *approval* version of the Notice of Decision. In this situation, you will need to use the offline Notice of Decision (approval) template.

6.5.9. Recording CHSP classification and Support at Home classification 1 to 8 approvals in the Notice of Decision

For CHSP Ongoing – there is one classification in the system. However, when an individual is approved to access CHSP services alongside Support at Home 1 to 8 classification, the older person will *only* be approved for the Support at Home classification.

However, the CHSP section will still display in the Notice of Decision. If Support at Home 1 to 8 classification is approved, Assessment Delegates will need to manually remove the CHSP classification level approval in the Notice of Decision.

Replacement text and instructions are provided to inform the client what CHSP services they have been approved for and how to access their referral codes, which are contained in the client's Support Plan.

Detailed instructions are provided in the Notice of Decision to help Assessment Delegates complete the required steps accurately.

However, if an older person is approved for one of the Support at Home classification levels, and has not previously been approved for funded aged care services in the home support service group, they can be referred to access their approved services through a CHSP provider while they wait for the Support at Home place to be allocated, **without** having an assigned CHSP classification level (CHSP class).

See 6.5.6 section for further details about when an individual with a SaH classification can be approved to access CHSP services.

6.5.10. Time-limited definition

What short term or time limited means depends on the specific circumstances and needs of each individual client. As a guide, up to 2 months would be considered short-term services.

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6.5.11. Wellness and reablement under CHSP

Reablement approaches under CHSP involve recommending time-limited services for a period of up to 12 weeks. Time-limited support aims to address a specific barrier to independence and to support the older person getting back to doing things for themselves. This involves a targeted timeframe, developed with the older person, to achieve their goals.

All providers are able to deliver this service under every CHSP service type. (i.e. assessors can refer for short term reablement to any CHSP provider).

For further guidance taking a wellness and reablement approach through CHSP, see 'Delivering Time Limited Reablement' section in Chapter 5 of this Manual.

Department of Health, Disability and Ageing website:

- Commonwealth Home Support Program (CHSP) 2025-27 Manual | Australian Government Department of Health, Disability and Ageing
- Wellness and reablement resources
- Living Well at Home – CHSP Good Practice Guide

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6.6. National Aboriginal and Torres Strait Islander Flexible Aged Care Program (NATSIFACP)

The NATSIFACP funds service providers to provide flexible, culturally safe aged care to older Aboriginal and Torres Strait Islander people close to their home and/or community.

Service providers deliver a mix of residential and home care services in accordance with the needs of the community which are located mainly in rural and remote areas.

The NATSIFACP is administered under the *Aged Care Act 2024* as a specialist aged care program.

The services provided through NATSIFACP must reflect the service list prescribed by the *Aged Care Rules 2025*.

6.6.1. Assessing for NATSIFACP

From 1 November 2025 anyone seeking NATSIFACP aged care services will require an aged care needs assessment under the *Aged Care Act 2024*. NATSIFACP providers can also make this application on the older person's behalf, either by phone or online. This may include supporting the older person by self-referring the assessment to known assessment organisations in the area, including Aboriginal and Torres Strait Islander assessment organisations in future.

Under the NATSIFACP, providers deliver a mix of residential, home and community care services in accordance with the individual's assessed care needs, and the needs of the community. Services may be provided on a permanent (ongoing) or short term (non-ongoing) basis, as well as to support emergency needs. To support this flexible service delivery model, the NATSIFAC Program is block funded. This means individuals accessing care under the program do not have allocated budgets. Arrangements for care recipient

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contributions are also variable and take into account the capacity of individuals to contribute toward the cost of the services delivered to them.

Older people already receiving NATSIFACP services in the 12-months before 1 November 2025 will be deemed across to the *Aged Care Act 2024 (the Act)* and will not have to have an aged care needs assessment if they wish to continue receiving NATSIFACP services after the Act starts.]

In all cases, assessors should work with NATSIFACP organisations already providing care to inform their aged care assessments. By working together, assessors and providers can avoid older Aboriginal and Torres Strait Islander people having to tell their story multiple times and ensure culturally safe assessments are conducted. This includes using information the NATSIFACP provider has gathered to help inform the assessment.

More information is available on the department's website at National Aboriginal and Torres Strait Islander Flexible Aged Care Program.

6.6.2. Recommending NATSIFACP pathway

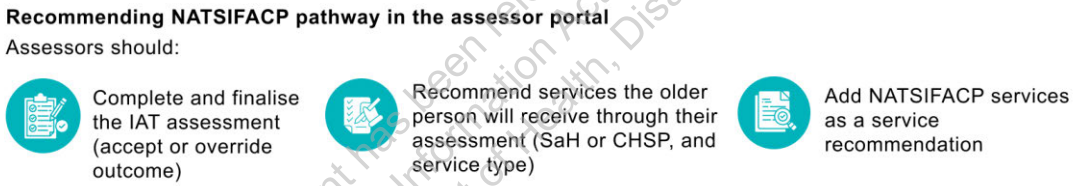

Figure 5 – recommending NATSIFACP pathway in the assessor portal

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The option to add NATSIFACP services as a service recommendation in an older person's Support Plan are available via the 'Add a service recommendation button' on the 'Support plan and services page'.

When adding a service recommendation for NATSIFACP, a drop-down box will require the assessor to select a priority. From 1 November 2025, there is no priority system in place to receive services through NATSIFACP and the priority value in the service recommendation tab will not impact the timeliness of receiving these services. For consistency, assessors are required to set the priority value for the NATSIFACP service recommendation to low.

It is best practice for a NATISFACP service recommendation to be fully recorded in the assessment notes to ensure that information in the support plan is accurate and complete.

In the Notes section, assessors should include the following information:

- If the older person would benefit from accessing services through a NATISFACP provider in their local area
- If the person would like to access services through a NATISFACP provider in their local area

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6.6.3. Interactions with other programs

All service groups and types can be delivered under NATSIFACP.

In general, home care services must not be provided to individuals who are receiving other government-subsidised services that are similar. However, individuals may access both the NATSIFAC Program and Support at Home at the same time, provided the services accessed under the programs are different. For example, a participant could access gardening through Support at Home and personal care via the NATSIFAC Program They may require a reassessment to change providers, this will depend on whether they only have a NATSIFACP default classification level, the service types they require and the range of programs available at their new location.

For further information, please refer to the NATSIFACP Manual.

6.7. Multi-Purpose Service Program (MPSP)

The MPSP provides integrated health and aged care services for older people living in small rural towns and remote areas that cannot support stand-alone aged care and health services.

The MPSP is managed under the *Aged Care Act 2024* as a type of specialist aged care program.

The following aged care services can be delivered under the MPSP:

- Permanent residential care services
- Residential respite
- Home or community services

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6.7.1. Assessing for MPSP

Any person seeking to access services under the MPSP must make an application for funded aged care services. This must be in the approved form.

6.7.2. Recommending MPSP pathway in the assessor portal

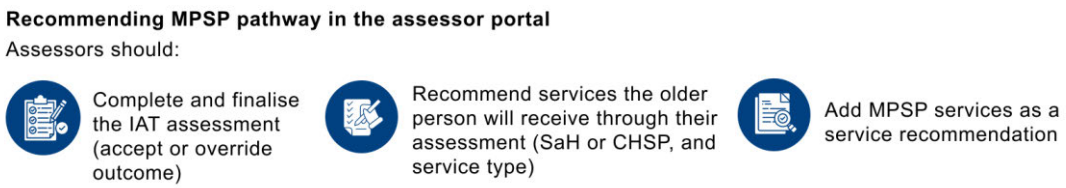

Figure 6 – Recommending MPSP pathway in the assessor portal

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When adding a service recommendation for MPSP, a drop-down box will require the assessor to select a priority. From 1 November there is no priority system in place to receive services through and MPSP and the priority value in the service recommendation tab will not impact the timeliness of receiving these services. For consistency, assessors are required to set the priority value for the MPSP service recommendation to low.

It is best practice for all MPSP service recommendations to be fully recorded in the assessment notes to ensure that information in the support plan is accurate and complete.

In the Notes section, assessors should include the following information:

- If the older person would benefit from accessing services through a MPSP provider in their local area
- If the person would like to access services through a MPSP provider in their local area

6.7.3. Interactions with other programs

An older person cannot usually access services in the home and community and in a residential care home at the same time.

A person approved for home support, assistive technology and home modification service groups may concurrently access some services through an MPSP, and other services through a mainstream registered provider (e.g. a provider who delivers services under the Support at Home program). For example, the person could access gardening and meal delivery services through Support at Home, while accessing nursing care through the MPSP. However, they cannot access the same type of service on the same day from a specialist aged care program provider and another service provider.

Where the needs assessor discussed the person seeking access to services through their local MPS, the decision and plan should also include a specific referral code that a provider delivering services under the MPSP can use.

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About the Multi-Purpose Service Program | Australian Government Department of Health, Disability and Ageing

6.7.4. Referrals to NATSIFACP and MPSP providers

If a person is recommended for one or more services groups (e.g. Home Support, Assistive Technology, Home Modifications or Residential Care) and they intend to access the services under MPSP or NATSIFACP, the assessor should provide a MPSP or NATSIFACP service recommendation for the person as appropriate.

This is in addition to providing service recommendations for one or more service groups which the assessor considers they meet the criteria for (e.g. Home Support, Assistive Technology, Home Modifications or Residential Care).

This will ensure the person will have a lawful access approval under the *Aged Care Act 2024*, but also that they can be referred to a specialist provider in their local area where they are approved to access services. It will also ensure that additional information about the relevant specialist aged care program is included in their decision letter.

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Assessment Delegates are responsible for approving service recommendations.

Important:

It is not sufficient to only make a service recommendation for MPSP or NATSIFACP, as an individual cannot access services under these programs without an access approval from a delegate for one or more service groups.

If the client has been approved for home support with an ongoing Support at Home (SaH) classification or for the AT-HM scheme, but intends to initially access services through their local MPSP or NATSIFACP provider, the assessor should set the 'Seeking Services' field to 'No' for one or all of these recommendations as needed. This must be confirmed with the individual before selecting the field. This will prevent the individual from being added to the prioritisation queue(s) for these services and being offered a place which they do not intend to accept at that time. You should not do this if you expect the older person will need to concurrently access services from both the MPSP/NATSIFACP and SaH program and/or the AT-HM scheme.

If the client has only been approved for Home Support with a CHSP class, then an assessment delegate will need to ensure that:

- the MPSP or NATSIFACP service recommendation is recorded in the Notes section (as well as being a service recommendation in the support plan)
- the support plan and Notice of Decision include the required MPSP and/or NATSIFACP text.

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6.8. Transition Care Program (TCP)

Transition care is available to older people following admission to hospital. The program is delivered under the service groups home support, assistive technology, and residential care**.** Transition Care is designed to support individuals in the period immediately after discharge from hospital. It aims to facilitate recovery, improve functional capacity, and provide time and support in a non-hospital environment while long-term care arrangements are being considered.

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Services include:

- social work
- nursing support
- personal care
- allied health care
- equipment and products to assist with mobility.

Transition care can take place in a person's home, a community setting or a residential aged care setting. Older people accessing Support at Home can also access TCP services if they are assessed as eligible to receive transition care and there is no duplication in service provision.

6.8.1. Access to transition care

Transition care is time-limited, with individuals allocated a funded period of 12 weeks to access services under the program. However, if the individual's recovery requires additional time, the service provider can apply for an extension.

The Transition Care Program is defined under the *Aged Care Act 2024*as a specialist aged care program. The number of places available for this care type is determined by the Federal Minister for Health, Disability and Ageing, based on state and territory needs.
Only registered providers are permitted to deliver hospital transition care using these allocated places.

Importantly, to be eligible for the program, the individual must be:

- medically stable at the time of assessment; and
- is in the concluding stage of a hospital episode; and
- has the potential to benefit from accessing services delivered through the relevant service group under the TCP; and
- at the time the assessment was carried out, an admitted hospital patient. This includes people receiving hospital-in-the-home. It excludes people in Emergency Wards.

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Once an individual is approved for hospital transition care, it is usual practice for hospital discharge staff to refer them directly to their local Transition Care provider, following delegated approval.

6.8.2. Recommending transition care

When recommending Transition Care, an assessor will need to override the IAT outcome to 'ineligible for CHSP/SaH' and then choose the 'Transition Care' option under the 'Add a Care type for Delegate Decision' button. Transition Care will then continue to be recommended and approved as per the existing process. The system will still allow CHSP services to be recommended concurrently with TCP if required.

When recommending Transition Care in the support plan, assessors will add the care type Transition Care – After Hospital Care. When approved by the assessment delegate, the client will be approved for the following Service Groups:

- Home Support;
- Assistive Technology; and
- Residential Care.

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The client will then have access to all of the required Transition Care service types under each service group, to allow them to receive transition care across different care settings including their home/in the community and Residential Care or a mixture of both. The Assessor and Assessment Delegate are not required to action any additional tasks such as selecting service types within the system in order for the client to be approved for all of the service groups above. These service group approvals will appear in the Notice of Decision Letter.

Approving all three service groups will allow TCP to provide all of the following Service Types to TCP clients when needed:

- Section 8-15 – Allied health and therapy
- Section 8-20 – Assistance with transition care
- Section 8-35 – Domestic assistance
- Section 8-45 – Home maintenance and repairs
- Section 8-55 – Meals
- Section 8-60 – Nursing care
- Section 8-65 – Nutrition
- Section 8-70 – Personal care
- Section 8-110 – Equipment and products
- Section 8-140 - Residential accommodation
- Section 8-145 - Residential everyday living
- Section 8-150 - Residential non-clinical care
- Section 8-155 - Residential clinical care.

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These service types are all funded through the Transition Care daily subsidy rate (paid to providers). There is no need to apply for separate funding through Support at Home or Residential Care.

Under Assistive Technology, the provision of loaned equipment and products to assist clients with mobility will continue to be offered by providers, funding for this will continue to be covered through the transition care daily subsidy rate (paid to providers). There is no need to apply for separate funding under the Assistive Technology Service Group.

However, the provision and management of equipment under TCP is determined at the discretion of each state and territory. Jurisdictions may choose to provide equipment on either a permanent or loaned basis, depending on their local policies and operational arrangements.

When the older person is approved as eligible for transition care at the time of the initial assessment, it is likely they will need a re-assessment before the completion of their transition care episode, to establish their long-term care requirements. Where this is necessary, the assessor should review any changes to the person's care needs and ensure that the long-term care recommendations reflect the revised level of need and the person's preferences. In very limited circumstances, the clinical assessor may determine that the older person requires an approval for both ongoing Support at Home and TCP, which may be accessed concurrently'

6.8.3. Accessing Support at Home or CHSP and transition care Program

Support at Home and CHSP participants can access TCP after a hospital stay if they are assessed and approved as eligible by an aged care assessor. Support at Home and CHSP

services can continue to be accessed while accessing TCP, as long as the services are not duplicative. For example, an older person may elect to continue receiving gardening services under Support at Home in order to maintain a safe home environment, while they receive other services under TCP. It is the responsibility of the participant to notify their Support at Home or CHSP provider of their intention to enter transition care. It is expected that the participant's Support at Home or CHSP provider and the relevant transition care provider will discuss and coordinate care provision to ensure the participant's needs are met.

6.8.4. Accessing residential care/residential respite and transition care

A person in permanent residential care who is receiving Transition Care must take Hospital Transition Leave for the duration of their TCP episode. In addition, they are not eligible to receive services under the Restorative Care Pathway under Support at Home.

An individual receiving Transition Care is unable to access **residential respite care** while Transition Care is in effect.

6.8.5. Duration of transition care

The standard period for a transition care episode is 12 weeks (84 days).

This period may be extended by 6 weeks so the total transition care episode is 18 weeks (126 days) if the provider makes an application on behalf of the individual in accordance with the requirements of the Rules and is determined to require access to the services for the additional period.

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Lapsing of transition care approval

A transition care approval will lapse under the following circumstances:

1. **Delayed Entry into Care:** If the individual does not commence transition care within four weeks (28 days) following the approval date, the approval will lapse.

2. **Re-entry After Hospitalisation:** If an individual completes a transition care episode and, after a subsequent hospital stay, seeks to begin a new transition care episode beyond the initial four-week entry period, a new approval is required.

Breaks in care

Individuals in the Transition Care Program (TCP) may take breaks in their care, known as break days, for up to seven days in total during a single episode of transition care. These leave days do not need to be consecutive and may be used for a range of reasons, such as brief hospital readmission or personal/social circumstances.

If the individual exceeds the seven-day leave limit, their TCP approval will automatically expire. In such cases, the individual must be reassessed, and the older person must receive a new approval before they can recommence transition care.

6.8.6. Transition care extensions

If an individual is still making functional gains and would benefit from additional time in Transition Care, the Transition Care provider can request an extension of up to 42 days, with the potential for a further 42-day extension if clinically appropriate.

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To initiate the process, the Transition Care provider must submit an extension request via the My Aged Care Service and Support Portal to the assessment organisation. This request must be submitted before and approved by the 84th day of the care episode. The request should include the reason for the extension, the duration requested, and any supporting information relevant to the individual's ongoing care needs. Note there is no right of review if an extension request is declined.

The assessment organisation will receive and action the request through the My Aged Care Assessor Portal. The Assessment Delegate will be responsible for reviewing and making a decision on the request.

When recording a decision to approve an individual for Transition Care, a drop-down box will require the assessor to select a priority. From 1 November 2025, there is no priority system in place to receive services through Transition Care and the priority value will not impact the timeliness of receiving these services. For consistency, assessors are required to set the priority to 'high' for all assessments.

Transition Care Program Guidelines – November 2025 | Australian Government Department of Health, Disability and Ageing

6.9. Residential care

Residential aged care is a care type that can be recommended to an older person. There are two types of residential care: ongoing (permanent) and short-term (respite).

An ongoing residential care approval does not compel an older person to enter residential care, it simply enables a person to commence residential care services if and when they choose to do so, without the need for further assessment.

Matters relating to residential care must be decided with the consent of the older person, and if they do not have capacity, their appointed decision maker (whether or not that person is a registered supporter). Appointed decision makers must have authority to make any decisions relative to residential care, and that authority must be active.

Where possible, older people should be supported to live in their community for as long as possible. An assessment may, however, identify residential care as a suitable option for an older person who is no longer able to be adequately cared for by carers or family, and is incapable of living in their community without support.

Application and approval for residential care means the person meets the eligibility criteria and the care type is appropriate for their care needs. To be approved for residential care a delegate must be satisfied that section 68 of the Act applies to an older person who is not Aboriginal and/or Torres Strait Islander. The older person must be 'sick' and because of that 'sickness' have a continuing need for residential care. For further information on the Act's definition of sickness and approvals under section 68, refer to section 7.6.4 of Chapter 7.

On 1 October 2022, the Australian National Aged Care Classification (AN-ACC) residential care funding model replaced the Aged Care Funding Instrument.

Following an older person's admission to residential care, a residential aged care funding assessor (RAC funding assessor) will conduct an assessment using the AN-ACC assessment tool. The assessment information is uploaded and is used to determine the resident's classification.

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A person who is eligible for residential care may require daily assistance with:

1. meals (including special diets)
2. bathing, showering, dressing and personal hygiene
3. toileting and continence management
4. general nursing care (e.g. wound management)
5. organising and taking medication
6. communication (including fitting sensory or communication aids)
7. transfers and mobility
8. assessment and referral for appropriate support; and/or
9. emotional support

If an older person's concerns and goals identifies the need for residential care, ongoing and short-term residential care can be added to a person's support plan through the 'add care type' button on the *Goals & recommendations* tab.

An assessor will need to consider the person's:

- physical needs – how much support does the person need for daily living activities (i.e. preparing meals, eating, showering, dressing etc.) their level of mobility and whether they need assistance to walk, sit and stand
- health needs - does the person have chronic health issues that require nursing intervention or regular clinical/medical procedures
- cognitive needs – does the person have issues with memory, orientation, or thinking abilities, is there a diagnosis of dementia, such as Alzheimer's disease
- psychological and wellbeing needs – do they have any symptoms of depression, anxiety or other mental health challenges, or isolation. Is there a strong social support network for the person
- current living arrangements – what is their living situation and is their living environment safe, do they have family and friends for informal support
- carer impacts – does the carer need a break and would respite support the person's wishes to stay in their own home longer

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There may be a combination of any of the above needs or factors, or a single need that results in the assessor determining that an individual is incapable of living in a home or community setting without support (*Aged Care Rules 2025* Section 65-20 eligibility requirement – service group residential care) and has a continuing need for funded aged care services, including nursing services (*Aged Care Act 2024*, Division 3, Section 68).

6.9.1. Recommending residential care

If an assessor recommends that a client only receive ongoing residential care and/or short-term residential care, there are two pathways to consider when recommending these services:

- An assessor can choose to override the IAT outcome to 'ineligible for CHSP/SAH' and then choose Residential Permanent and/or Residential Respite options under the 'Add a Care type for Delegate Decision' button
- An assessor can accept a 'SaH Classification' or 'CHSP' IAT outcome, then choose Residential Permanent and/or Residential Respite from the 'Add a care type for delegate decision' button. The assessor must then ensure that the Support at Home classification is switched to 'not seeking services' and kept as a latent class. This provides the client with flexibility in case they want to return home in the future and access home support services.

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6.9.2. Priority for ongoing residential care

To meet the requirements of the *Aged Care Act 2024*, an older person being approved for permanent residential care will be assigned a priority category (1, 2 or 3). Although important, the priority category will not impact when a person can access residential care services or services under a specialist aged care program.

Table 30. Description of priority categories

Category	Description
1	The person: • has a high urgency rating; or • resides in a rural or remote area classified as MM 5, MM 6 or MMM 7; or • is Aboriginal or Torres Strait Islander, homeless, or is entering residential care due to emergency circumstances.
2	The person does not meet the criteria for Priority Category 1 and has a medium urgency rating.
3	The person does not meet the criteria for Priority Category 1 and has a low urgency rating.

The priority category is automatically generated by the assessor portal based on the individual's circumstances, urgency rating and in accordance with the criteria specified by the Aged Care Rules 2025.

Assessment Delegates will need to verify that the urgency rating assigned to the individual accurately reflects their needs and are supported by the evidence provided.

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6.9.3. Urgency rating for residential care

A person's urgency rating is different to their need for residential care. While it is expected that all people with a recommendation for residential care have been assessed as having high-level care needs, their level of urgency indicates the extent to which a person may be at immediate risk, including to personal health and safety, if they are not admitted to residential care within a timely manner.

This rating will not undermine the older person's ability to choose to remain in their home but will provide a guide for providers of residential care homes and others (such as Care Finders) to prioritise people who may be most at risk.

When selecting 'Residential Permanent' under the 'Add a care type for Delegate decision' in the My Aged Care assessor portal, assessors will be required to give a response to 'What is the urgency of this care type'. This question is a mandatory question with a rating to be selected from high, medium or low.

The Rules specify when an urgency rating of low, medium or high will apply to an individual in relation the classification type ongoing for residential care. The table below summarises the criteria for each urgency rating.

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Provide a rating (low, medium or high) which balances objective consideration of needs with the subjective perspective of the older person. The older person's perspective may be conveyed by their registered supporter. Include a brief note in the *reason or comments* section explaining key reasons for the rating, which may include:

- Key individual, care related or contextual needs and how these relate to any safety/wellbeing risks
- Whether the older person/ has expressed an urgent need to enter care
- Perspective on estimated timeframe the older person needs to enter care

Relevant factors to consider in determining urgency may include:

- Current care settings (including if the person is transitioning into residential aged care from hospital or residential respite care)
- Significant and visible decline in the level of function, cognition and/or ability to perform activities of daily living in the home with available support
- Health conditions and ability to manage these in the home with available support
- Severe incontinence that cannot be managed within the current care settings
- High risk to personal safety (e.g. hazardous home environment, high risk of falls, wandering, or elder abuse)
- Complex factors, including but not limited to: homelessness or risk of homelessness; drug and alcohol abuse; mental health issues; or severe social isolation
- Lack of available and sustainable formal, informal support (including any impacts on carers)

Where the older person has a registered supporter, who is not an appointed decision maker, that registered supporter can be involved in any discussions in line with the will and preferences of the older person. Registered supporters help older people to make and communicate their own decisions about aged care. This includes supporting the older person to make aged care decisions and communicating information for the older person.

The following can be used as a guide to what urgency may look like within each category. Examples are provided for demonstrative purposes only and each case will need to be judged independently based on diverse individual factors.

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Table 31. Guide to urgency ratings for residential care

Level of urgency	Description
High urgency	**This rating applies if:** • The individual has a need for immediate access to ongoing funded aged care services delivered in an approved residential care home which, if not met, may place the individual's safety, health or wellbeing at risk. **Indicators**: Recent falls, hospital admission, unsafe to return home, severe decline.

Level of urgency	Description
	Example: A client in hospital post-fall who lives alone and whose needs exceed Home Care supports. Example: John has an ongoing Support at Home classification 8. He recently had a fall and is currently in hospital. John feels like he is unable to return home, and the hospital requests an urgent aged care assessment. The outcomes of John's assessment reveal several risk factors. His health and function are declining, and he has experienced several incidences of falls in recent months leading to hospital admissions. He lives alone, feels socially isolated and needs substantially more hours of care than is possible through the formal support he can receive through Support at Home. The Assessment Delegate approves John for ongoing residential aged care services, with a high urgency rating.
Medium urgency	**This rating applies if:** • The circumstances for a high urgency rating do not apply to the individual; and • When considering the individual's circumstances and preferences, the individual is expected to seek access to permanent residential care within the next 6 months. Example: Mei has been receiving CHSP services for a few years and recently requested a support plan review to have her needs and services reviewed. As her needs have increased, and she has some complex factors, including declining cognition and moderate incontinence, a reassessment was arranged by the assessor. Mei's daughter, Tao, is her primary carer and is becoming overwhelmed. She's concerned about how much longer Mei will be able to remain living at home by herself, should her cognition and incontinence deteriorate. Mei speaks to her GP and requests a reassessment. The assessor has a conversation with Mei and Tao about the option of ongoing residential care, and they agree that Mei will likely move into an aged care home within the next three to six months. Mei is approved for ongoing Support at Home as well as ongoing residential aged care services, with a medium urgency rating.

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Level of urgency	Description
Low urgency	**This rating applies if**: • The circumstances for a high or medium urgency rating do not apply to the individual. Example: Maria has been receiving CHSP services in her home. She can still complete many basic and daily living tasks without help but has had a few minor falls recently and is becoming less mobile around the house. Through a reassessment, an ongoing Support at Home classification is approved to meet her current needs. She's feeling very lonely as many of her friends in the community have already moved into aged care facilities, and her children live interstate. She is worried that she might have another fall and need to move into an aged care home. Maria's son agrees to move in with her to provide informal care for 6 months, but she knows that she'll probably need to move into residential aged care once he leaves. Maria is approved for ongoing residential aged care, with a low urgency rating.

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Clients residing in rural and remote areas

IT System enhancements have been built to map a client's residential address to their relevant Modified Monash Model (MMM) 2023 region which is needed to determine their priority. This will be completed automatically for every client approved for residential aged care.

If the client is being assessed in a temporary location, the address where the client is generally located should be used. If the older person is being assessed in a city whilst staying with family, this will greatly skew the urgency rating.

When an older person registers with My Aged Care, they will be prompted to enter in relevant contact details including their home address. If a home address has not been inputted or is incorrect, an assessor may input or update a clients address at the time of assessment. This is a mandatory field as part of My Aged Care registration/assessment. If you update the individual's address, you will need to click on the 'validate this address' button to populate the MM classification.

A yellow text box may appear when residential care is added or edited as a care type in the *'goals and recommendations'* section of the support plan and the MM classification has not been mapped to the individual's record. The yellow box will seek to update the clients address in their record or manually select the appropriate Modified Monash (MM) area.

Modified Monash Model | Australian Government Department of Health, Disability and Ageing

6.9.4. Place allocation

From 1 November 2025, the new residential care system will allocate residential care places (permanent or respite) directly to older people. This is the 'Places to People' reform.

Places will be assigned directly to older people who can then access government-funded residential care services. This will give them more choice and control over what provider delivers their services.

Mainstream residential care providers will no longer need an allocation of places to deliver government-funded aged care services.

Providers that deliver residential aged care through a specialist program (such as MPSP or TCP) will still get allocated places, for further information see resource below.

Places to people – Embedding choice in residential aged care | Australian Government Department of Health, Disability and Ageing

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If a person has been approved for residential care, (permanent or respite), they will be allocated a place immediately. They will be advised on this in the Notice of Decision letter.

There will be no delays to allocate the place. Once the person has their place it stays on their My Aged Care account and will not be withdrawn. There are no time limits for when people need to enter into care.

6.10. Residential respite care

Short-term (respite) care is provided as an alternative care arrangement with the primary purpose of giving a carer or an individual in need of care a short-term break from their usual care arrangement. Residential respite is not intended as an alternative to restorative care.

Older people will continue to be able to access emergency respite care through the alternative entry pathway, even if they have not been assessed and approved for short-term residential care.

6.10.1. Recommending residential respite care

When recommending an individual for residential respite care, assessors should complete the De Morton Mobility Index – modified (DEMMI-modified) assessment. This tool assesses the individual's mobility and determines their eligibility for one of three respite funding classes: Respite class 1, Respite class 2, Respite class 3, based on the level of mobility observed.

The DEMMI-modified assessment is available within the IAT, and can only be used as part of a comprehensive assessment, as it must be completed by a clinically trained assessor. A non-clinical assessor cannot complete the DEMMI-modified even with clinical attendance.

The question, '*Are you likely to recommend residential respite care*' in the IAT is only available in comprehensive assessments. Assessors who are completing a home support assessment and likely to recommend residential respite must convert the assessment to a comprehensive assessment.

If the DEMMI-modified assessment cannot be completed at the time of assessment, the individual will be temporarily assigned a default funding class (Class 0). This classification remains in place until a formal RAC funding assessment is carried out within the residential aged care home, by a RAC funding assessor, at which point the appropriate funding class can be determined based on the individual's assessed mobility.

Note:

Approvals for short-term residential care will not be prioritised. When you view the care type recommendation for Residential Respite Care, you will see the 'Urgency' field has been automatically set to 'High' and cannot be edited.

6.10.2. Extensions for residential respite

Assessment Delegates may receive requests for a 21-day extension to residential respite care —for example, when a carer is unwell or temporarily unable to resume their care responsibilities. There is no limit to the number of extensions that may be granted beyond the standard 63 days of respite care per financial year.

Typically, the residential aged care provider submits the extension request via the My Aged Care Service and Support Portal, and the assessment organisation receives it through the Assessor Portal for the assessment delegate's action.

The Assessment Delegates' responsibility is to review the request and either approve or decline it. Once a decision is made, they must communicate the outcome to the provider.

The Assessment Delegate will need to be satisfied that an increase in the number of respite days was necessary due to any of the following:

(a) carer stress

(b) severity of the individual's condition

(c) absence of the individual's carer

(d) any other relevant matter (for example, where a provider delivers an episode of respite care in good faith but subsequently finds out the care recipient's allocation of respite days had already been exhausted).

Note:

There is no right of review if an extension request is declined.

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Once decided, the assessment delegate must give written notice to the registered provider of your decision whether to extend within 28 days after the application was made. This written notice must include the day the decision takes effect, which may be before the day the decision is made.

Extensions are granted only at the previously approved level of care. If a higher level is needed, a reassessment and new approval by a Clinical Assessment Delegate is required before the extension can be granted

Where multiple extensions are being requested in one financial year, the assessor should review the Support Plan in consultation with the client, family and provider, to confirm the appropriateness of the residential respite care with the possibility of considering other care options. This will include whether there is an appropriate Support Plan in place to safely support the person to return home following the residential respite care episode (see section: Residential Care).

For more information on managing residential respite extensions, refer to Managing residential respite care | Australian Government Department of Health, Disability and Ageing

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6.11. Other programs and supports

6.11.1. Dementia specific programs and supports

Counselling, education, information, and other support for people living with dementia or experiencing cognitive decline, and their care partners, families, and representatives is available by contacting the National Dementia Helpline on **1800 100 500** or visiting the Dementia Australia website.

The National Dementia Helpline is available 24 hours a day, 7 days a week. Dementia Australia is the sole provider of National Dementia Support Program services.

Chapter 12 outlines a system to refer carers of My Aged Care older people with dementia or experiencing cognitive decline to the National Dementia Helpline, with their consent. A trained professional from Dementia Australia will call the older person and speak to them about dementia-specific services and supports that might assist to help improve or maintain their quality of life.

Note:
An older person does not need a cognitive diagnosis to be referred to Dementia Australia for support.

6.11.2. Dementia Carer Respite and Wellbeing Program

The Dementia Carer Respite and Wellbeing Program (also known as the Staying at Home program) delivers models of respite care through a shared respite experience, attended by both the person living with dementia and their care partner.

The program expands on existing supports to:

- maintain or improve quality of life for care partners and people living with dementia
- increase care partner knowledge, skills and capability to care for a person living with dementia at home improve the experience and quality of respite care for care partners and people living with dementia
- support people living with dementia to stay at home for longer
- provide peer support connections for care partners and people living with dementia

Care providers (supported by Dementia Support Australia) deliver the Staying at Home program. Informal carers can register their interest on the Dementia Support Australia website or by contacting the 24-hour DSA helpline on **1800 699 799.**

There are also a small number of dementia specific innovative respite care programs being trialled across Australia.

6.11.3. Dementia behaviour supports

Dementia Behaviour Management Advisory Service (DBMAS), delivered by Dementia Support Australia (DSA), provides free support and advice to service providers and individuals caring for people with dementia in any location or setting in Australia. It provides support when the behavioural and psychological symptoms of dementia (BPSD) start to impact a person's quality of care. Family carers and service providers can contact the 24-hour DSA helpline for advice on **1800 699 799**.

Severe Behaviour Response Teams (SBRT), also delivered by DSA, is a mobile service that responds onsite within 48 hours. It offers free support and advice to approved aged care providers where there is heightened severity of BPSD or risk to the person living with dementia, or their care network. SBRT will partner with the person living with dementia and their care network to understand the causes that led to changes in behaviour. Providers can contact the 24-hour DSA helpline for advice on **1800 699 799**.

The **Hospital to Aged Care Dementia Support Program** helps older people living with dementia transition from hospital into residential aged care or home with aged care support. The program supports hospital and aged care staff, the older person and their family or carers:

- during their hospital stay
- when transitioning out of hospital
- following hospital discharge into an aged care supported environment for up to 3 months

DSA are delivering the program in 11 locations with a presence in all states and territories and referrals are accepted from hospital staff in participating hospital sites.

A HACDSP program framework has been developed and provides high level program overview, scope, and administrative arrangements and is available by emailing HACDSP@health.gov.au

Information about the program and eligibility can also be found on DSA's website Hospital to Aged Care Dementia Support Program (HACDSP)

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6.11.4. Specialist dementia care

The **Specialist Dementia Care Program (SDCP)** supports people with very severe BPSD whose support needs cannot be met in a residential aged care facility. Care is provided in small groups in a cottage-like dementia friendly environment. The program enables specialised care for people living with dementia in circumstances where the person has very severe dementia complicated by physical aggression or other behaviours that the person's residential care facility or carer partners cannot manage, even with help from other services.

The program provides transitional care aimed at stabilising behaviours over approximately a 12 month period prior to transitioning the resident to a less intensive care setting when they no longer need SDCP care.

Referral and eligibility for the program is undertaken by Dementia Support Australia (DSA) through the Needs Based Assessment Program. DSA can be contacted on **1800 699 799**.

Dementia Support Australia

Staying at Home

Assessing for Eligibility for the Specialist Dementia Care Program (SDCP)

Specialist Dementia Care Program information booklet

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6.11.5. Department of Veterans' Affairs (DVA)

Veterans have the same right of access to community and aged care programs as any other member of the community. The *Aged Care Act 2024* lists veterans under the Statement of Principles (section 25). Veterans should not be discriminated against or refused care when accessing services from other community and aged care programs on an assumption that DVA will provide for all their care needs. DVA provides some entry-level care services but does not provide higher-level care services.

Veterans' Home Care (VHC) Program

Veterans' Home Care (VHC) is a DVA program designed to assist veterans and war widows/widowers who need a small amount of practical help to continue living independently in their own home. Services include domestic assistance, personal care, respite care, and safety-related home and garden maintenance. VHC is not designed to meet complex or high-level care needs.

Community nursing (CN)

CN provides clinical nursing and/or personal care services to eligible members of the veteran community in their own home. CN services can assist with medication, wound care, hygiene and dressing. CN services can help to restore or maintain health and independence at home and assist to avoid early admittance to hospital or residential care. Veterans requiring high-level care require prior approval by DVA.

CN services are provided by a mix of personnel including registered and enrolled nurses and nursing support staff, who work within the framework of their relevant national standards.

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Duplication of services

As long as there is no duplication of services between the programs, Veterans may access DVA's VHC and CN services at the same time as accessing **different services** from:

- Ongoing Support at Home
- CHSP
- TCP

For ongoing Support at Home, this access can occur regardless of the level of the package.

CHSP offers services that are not available through the VHC Program or other DVA arrangements, such as a wide range of social support, food services, community transport and centre-based day respite.

Assistance with fees

DVA may assist with the cost of fees for government funded aged care services for veterans, depending on the type of aged care and the eligibility of the veteran. We recommend the older person contact DVA on 1800 838 372 to check if they are eligible for assistance. If the person is a Prisoner of War or Victoria Cross recipient that served with the Australian Defence Force, DVA may provide additional fee assistance.

- Department of Veterans' Affairs
- Care at home and aged care services
- Community nursing
- Community Nursing Services and Providers

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6.11.6. NDIS participants

For NDIS participants who have turned 65 requesting access to CHSP, assessors must ensure a person is not referred for services they are already receiving through the NDIS and/or other Commonwealth, state, territory or local government programs.

An Assessment Delegate should be aware of and advise NDIS participants that under the *NDIS Act 2013* (NDIS Act) an under 65 NDIS participant can remain in the NDIS if they are an aged care recipient who subsequently turns 65. However, a NDIS participant whose first permanent entry to residential care or home care (but not residential respite care) is after the age of 65, ceases to be a NDIS participant. (NDIS Act section 29 (1)(b)).

6.11.7. Disability Support for Older Australians (DSOA) and aged care

The Disability Support for Older Australians (DSOA) Program commenced on 1 July 2021. It is a closed program with no new older people and provides funding for a range of services including Assistance in Supported Independent Living, Assistance with Self-Care Activities, Specialist/Behavioural Intervention Support, Therapy, and Case Management.

DSOA supports older Australians with a disability who cannot be supported by the in-home aged care system and were not eligible for the NDIS when it was rolled out in their region.

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Assessments for aged care services can impact a person's eligibility for funding under DSOA, and assessors should ensure a person has provided informed consent before proceeding to undertake an assessment.

The following services under CHSP will not affect DSOA funding:

- Hoarding and squalor assistance
- Social support and community engagement (Social Supports Group and Individual)
- Equipment and products
- Home adjustments
- Domestic assistance (General house cleaning and other approved household activities)
- Home maintenance and repairs (Home and Garden Maintenance)
- Meals
- Transport
- Specialised support services

Specialist aged care services also do not affect DSOA funding (i.e. TCP).

All other assessment outcomes will affect DSOA funding, and will do so in the following ways:

- An assessment for permanent Residential Aged Care will result in DSOA funding being capped at current levels. This also applies to CHSP service referrals not listed above. If a DSOA client is assessed as eligible for Support at Home and commences services, they will be required to exit the DSOA Program from the date aged care services commenced. These dates will be verified through My Aged Care.
- If a client commenced their Home Care Package prior to 1 July 2021 and are a transitioned HCP care recipient under SaH, they can continue in the DSOA Program. However, their DSOA funding will remain capped.
- If a client commenced CHSP services that are available through the DSOA program, they will be required to exit the DSOA Program from the date the aged care services commenced. These dates will be verified through My Aged Care. However, if a client commenced CHSP services, that are not available via the DSOA program, **prior to 30 June 2021**, the client can continue to access these services as a grandfathered support without any impact to their DSOA funding.

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If an assessor receives a referral for a DSOA older person they should:

- establish if the older person has advised their DSOA service coordinator (provider) that they are seeking a referral for an aged care assessment;
- establish if the older person discussed with their DSOA service coordinator their options to increase supports under the DSOA Program prior to an aged care assessment;
- establish if the DSOA service coordinator has initiated a Change of Needs application and reviewed the DSOA older person's Individual Support Package prior to consideration of an aged care assessment; and
- establish that the DSOA older people understands the impacts on their DSOA funding should they proceed to assessment.

Aged care assessors should keep these policy settings in mind when making recommendations for aged care supports for a DSOA older person. That is, in making a recommendation, the aged care assessor needs to consider whether aged care services can appropriately support the older person were they to exit the DSOA Program.

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Department of Health, Disability and Ageing website:

Disability Support for Older Australians Program (DSOA) manual

About the Disability Support for Older Australians Program

6.11.8. Carer support

Assessors should inform carers there is support and services specifically for them to access. This support is available through **Carer Gateway**, funded through the Department of Social Services, as well as the National Dementia Helpline (for care partners of people with dementia or experiencing cognitive decline), funded by the department.

Carer Gateway provides early-intervention and preventative supports and services to carers to help improve their well-being and long-term outcomes.

Carer Gateway is for all carers, no matter their age or the condition of the person they are caring for.

Carer Gateway consists of a website (www.carergateway.gov.au) and a national network of Carer Gateway service providers (CGSPs) (located in each state and territory).

CGSPs support carers with access to in person and digitally based supports and services including support planning, counselling, peer support, coaching, tailored support packages (including access to planned respite), emergency respite, and information and practical advice:

- Support Planning – assess the carer's needs and work with the carer to develop an agreed individual support plan.
- Counselling - professional counsellors for carers who are experiencing difficulties with anxiety, stress, depression and low mood as a result of their caring role.
- Peer Support – a service for carers to connect with people in similar caring circumstances and learning from their peers through the sharing of lived experiences.
- Coaching – carers work one to one with a coach, taking time to think about their own wellbeing and steps towards personal life goals.
- Tailored Support Packages – offers a range of practical supports to support carers access education and/or employment or assist carers in their caring role (e.g., access to planned respite, assistance with transport).
- Emergency Respite - help with accessing emergency respite support when a carer can no longer maintain the caring role due to illness for example.

CGSPs also assist with navigating relevant, local services available to carers, including My Aged Care, National Disability Insurance Scheme, Dementia Australia and referrals to other state/territory government funded carer support services.

CGSP staff talk with carers about the registration and support planning process, and then work with them to provide access to supports and services based on their individual needs and caring circumstances. The intent of the support planning is for carers to have the most appropriate supports in place to help maintain their wellbeing, which in turn helps maintain their capacity to continue their caring role and also to participate in their communities.

Assessors should collect carer information in the My Aged Care Assessor Portal or Aged Care Assessor App and register the older person and their carer's consent to request a call back from Carer Gateway and/or the National Dementia Helpline. The carer's local CGSP

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and/or the National Dementia Helpline will then contact them to assist with accessing supports to help them in their caring role.

Alternatively, assessors may inform carers they can contact their local CGSP by calling 1800 422 737 (selecting Option 1), Monday to Friday, between 8am and 5pm, or by visiting the Carer Gateway website (www.carergateway.gov.au) and completing the online 'Request for Call Back' form.

The Carer Gateway website also provides carers with practical advice, information and resources to help them in their caring role, as well as access to:

a national carer phone counselling service to help them manage daily challenges, reduce stress and strain, and plan for the future;

- an online peer support forum, connecting carers with other carers for knowledge and experience sharing, emotional support and mentoring;
- online self-guided coaching resources with simple techniques and strategies for goal-setting and future planning; and sources to increase skills and knowledge of carers relating to specific caring situations, to build confidence and improve wellbeing.

Assessors should also **note**, that CGSPs currently **do not** have the capability to receive referrals to book flexible, centre-based, cottage or residential respite for carers of My Aged Care older people.

Assessors should also be aware that under the Carer Gateway model, assistance for young carers to continue with or commence study through the Young Carer Bursary Program is available. Further information on the Young Carer Bursary Program and the application process is available at www.youngcarersnetwork.com.au/young-carer-bursary.

Dementia Australia's support for carers, family members, and representatives of people with dementia or experiencing cognitive decline includes providing in person, phone-based, or online dementia-specific counselling, peer support, and education.

Dementia Australia's carer supports can help people better understand the nature and impact of dementia, develop strategies to manage stress and mixed emotions, plan for the future, and manage grief.

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Carer Gateway website

Carer Gateway service provider free call:1800 422 737

Department of Health, Disability and Ageing website:

My Aged Care – Assessor Portal User Guide 2 – Registering support people and adding relationships

Young Carers Network website

National Dementia Helpline: 1800 100 500 - 24 hours a day, 7 days a week

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6.11.9. Aged Care Volunteers Visitors Scheme (ACVVS)

The Aged Care Volunteer Visitors Scheme (ACVVS) provides friendship and companionship to older people who are feeling lonely or socially isolated by matching them with a volunteer visitor. The ACVVS is a free program for eligible aged care recipients. Visits are available to anyone receiving Australian government-subsidised residential aged care or the Support at Home services. This includes care recipients approved or on the Support at Home Priority System and excludes those with a Commonwealth Home Support Program (CHSP).

The program requires the volunteer to make 20 ACVVS visits per year. These occur for approximately an hour a fortnight.

Anyone can refer an eligible older person to the ACVVS, including Aged Care Assessors, aged care service providers, health professionals, family members and friends. Older people can also refer themselves.

You can request a volunteer for an older person via the ACVVS website.

Aged Care Volunteer Visitors Scheme (ACVVS) | Australian Government Department of Health, Disability and Aged Care

6.11.10. Translating and Interpreting Service (TIS) National for people from culturally and linguistically diverse backgrounds

Every older person has a right to communicate in their preferred language or method of communication, with access to interpreters and communication aids as required.

If an older person requires an interpreter, TIS National's interpreting services are available 24 hours a day, 7 days a week, and can be accessed via telephone or through face-to-face sessions.

TIS National offers interpreting services for more than 70 years and has access to more than 2,700 interpreters, in over 150 languages and dialects, across Australia.

To access TIS National interpreting services, you first need to register by calling 1300 655 820 or emailing tispromo@homeaffairs.gov.au. Speak to your team manager, who will be able to provide advice about how you can book an interpreter.

Sign language interpreting services

Older Australians who are deaf, deafblind or hard of hearing, who are seeking to access or are in receipt of Commonwealth funded aged care services can access **free** sign language interpreting and captioning services. Sign language services can be provided face-to-face or by Video Remote, and live captioning services are available to support older people to better engage and fully participate in their aged care journey and activities of daily living.

Information on how service providers can access interpreting services is available online at My Aged Care (or by calling 1800 200 422) or Deaf Connect (or by calling 1300 773 803).

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If an older person enquires about sign language interpreting for daily activities, not aged care related, please refer them to Deaf Connect where they can also receive free services.

Sign language services are available in Auslan, American Sign Language, International Sign Language, and Signed English for Deaf or people who are hard of hearing, and tactile signing and hand over hand for people who are deafblind.

6.11.11. Interpreting services for Aboriginal and Torres Strait Islander people

It is important for Aboriginal and Torres Strait Islander Elders accessing or thinking of accessing Australian Government-funded aged care services to be able to communicate in an Aboriginal and Torres Strait Islander language if that is their preference.

To access Interpreter Connect, the Aboriginal and Torres Strait Islander Elder should call My Aged Care on 1800 200 422 and ask for an interpreter from the following list of languages. Through the interpreter, My Aged Care will answer the person's aged care questions and then, if asked to, will assist them with accessing services. Languages available include:

- Alyawarre
- Anmatyerre
- Arrernte (Eastern and Central)
- Arrernte (Western)
- Djambarrpuyngu
- Gumatj
- Kriol (Top End)
- Murrinh Patha
- Ngaanyatjarra
- Ngaatjatjarra
- Pintupi-Luritja
- Pitjantjatjara
- Torres Strait Creole/Yumpla Tok
- Warlpiri
- Yankunytjatjara
- Yolngu Matha

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If an interpreter from the above list is not available at the time of the call, an appropriate time that suits the Aboriginal and Torres Strait Islander Elder will be arranged. This service aims to make it easier for older Aboriginal and Torres Strait Islander people, their families and carers to access information on ageing and aged care, to have their needs assessed and to be supported to find the most appropriate services.

6.11.12. Elder Care Support

The Elder Care Support Program was established to recruit and train a trusted workforce to support older Aboriginal and Torres Strait Islander people and their families throughout their aged care journey. This support contributes to elders achieving a better, safer experience when accessing aged care services and having the information to make decisions on the care they need and receive.

The Elder Care Support program provides services that include:

- supporting older Aboriginal and Torres Strait Islander people to understand aged care services, navigate the assessment process and help with choosing a provider
- supporting families, friends and carers to understand how to access aged care services
- advocating for older Aboriginal and Torres Strait Islander people by working with assessors and providers to meet their needs

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- supporting older Aboriginal and Torres Strait Islander people while they receive aged care services
- assisting with other types of health needs, such as disability supports.

The National Aboriginal Community Controlled Health Organisation (NACCHO) Aged Care Programs team can provide further information about the program at agedcare@naccho.org.au.

Elder Care Support

6.11.13. Care Finders

The care finder program offers tailored, intensive support to people who have one or more reasons for requiring assistance to interact with My Aged Care and access aged care services and other relevant community supports.

Care finders help vulnerable older people understand and access aged care and connect with other relevant supports in their community. This includes people who are, or are not yet, receiving aged care services or other relevant supports.

Care finders support people who don't have family, friends, a carer or any other person they are comfortable receiving help from and who is willing and able to help them access aged care services and supports. Care finders conduct outreach and then register the older person through the My Aged Care contact centre.

Primary Health Networks (PHNs) are responsible for commissioning and managing care finder services, leveraging their commissioning expertise and in-depth understanding of local community needs.

Contact information for care finder services in each region is on the My Aged Care website at Help from a care finder.

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Care finder program

7. Chapter 7: Delegations and approvals under the Act

What you'll find in this chapter

This chapter includes information about:

- the powers under the *Aged Care Act 2024* that are delegated to Triage Delegates and Clinical and Non-Clinical Assessment Delegates.
- how approvals work under the *Aged Care Act* 2024, and the decisions that delegates make.

All sections in this chapter are new content

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7.1. Delegation of powers and functions under the *Aged Care Act 2024*

Under section 339 of the *Aged Care Act 2024* (the Act), the System Governor plays a key role in the governance of the aged care system responsible for facilitating equitable access to funded aged care services. Section 7 of the Act specifies the position of the System Governor is occupied by the Secretary of the Department of Health, Disability and Ageing.

The System Governor has the power under section 567 of the Act to delegate their functions and powers to others who may exercise them on their behalf. The Instrument of Delegation outlines the specific functions, powers and responsibilities of the System Governor which are delegated to certain positions within assessment organisations. Staff who occupy these positions are considered delegates and will continue to be nominated through the on/off delegate form.

Delegations are tied to the position, not to the individual. This means that the powers and functions stay with the role, and any qualified person who has been approved to hold the position can exercise these powers. The Instrument of Delegation outlines which positions within each assessment organisation can hold these responsibilities.

These delegations operate within the Single Assessment System and delegates must comply with Commonwealth guidelines, and any directions issued by the Secretary. This ensures that the delegation framework remains in line with current policies and standards.

7.2. Delegate responsibility

The role of the delegate is that of a primary decision-maker within a structured legal system. This means delegate decisions must be based on the legal requirements, facts, evidence, and clear reasoning. Understanding the legal framework and decision-making requirements is essential to making sound, defensible judgments.

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The Single Assessment System relies on delegates to fulfil their role efficiently and effectively. Delegate decisions ensure that due process is followed and that eligible clients receive the care and support they need.

Decisions made by Assessment Delegates may be subject to review in various contexts. This could include reconsideration requests or formal reviews by bodies such as the Administrative Review Tribunal (ART).

As a result, it is important that delegates maintain accurate, complete records and clear justifications for every decision they make.

There are three delegate positions which sit within assessment organisations:

- Triage Delegates
- Clinical Assessment Delegates
- Non-clinical Assessment Delegates

Under the *Aged Care Act 2024*, these delegate positions will be involved in certain assessment related activities outlined in the table below.

Table 32. Assessment related activities of delegate positions

Delegate position	Delegate activity
Triage Delegates	• Consider and determine an older person's eligibility for an aged care needs assessment or reassessment • Determine whether an older person requires a reassessment • Notify an older person of decisions and their right to review
Non-clinical Assessment Delegate	• Approve an older person's eligibility to access aged care services under the Commonwealth Home Support Program • Limit or vary an older person's approval for funded aged care services • Notify an older person of decisions and their right to review • Consider and approve any appropriate changes to an older person's access approval for services under the Commonwealth Home Support Program as a result of a Support Plan Review
Clinical Assessment Delegate	• Approve an older person's eligibility to access funded aged care services • Limit or varying an older person's approval for funded aged care services • Approve extensions for transition care and residential respite care services • Notify an older person of decisions and their right to review • Consider and approve any appropriate changes to an older person's access approval for services as a result of a support plan review

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Delegate position	Delegate activity
	• Consider and determine the outcome of a classification reassessment

For information about how to assign individuals to delegate positions, see Chapter 13

7.3. Triage Delegates

Triage Delegates are delegated under the *Aged Care Act 2024* (the Act) to decide:

- under Section 58 of the Act, whether an older person is eligible for a needs assessment for government funded aged care services.
- under section 64 of the Act, whether an older person has undergone a significant change of circumstances or other change in their circumstances and requires a reassessment of their needs.

To find someone eligible for a needs assessment, a triage delegate must be satisfied the older person meets the age eligibility requirement and has declared they have an aged care need.

See Chapter 5for information about the function of the Triage Delegate and conducting triage.

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7.4. Assessment Delegates

7.4.1. Non-clinical Assessment Delegates

Non-clinical Assessment Delegates are delegated the authority under the Act to approve entry-level services arising from a home support assessment.

This means they are restricted to approving access to the following:

- the Commonwealth Home Support Program (CHSP)
- assistive technology (AT) and/or home modifications (HM) under CHSP (*not* under the AT-HM Scheme).

If any approvals other than those listed above are required, the assessor must convert the assessment to a comprehensive assessment. Once an assessment is converted to a comprehensive assessment, the approval will flow to a Clinical Assessment Delegate. Clinical Assessment Delegate approval is required for all other approvals as outlined in detail in the next section.

All needs assessors will have delegation under the Aged Care Act 2024 (the Act) to approve entry-level services. Assessment Organisations can determine whether to permit all needs assessors to perform this function.

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When approving the recommendations from an assessment they have undertaken, needs assessors acting in their capacity as a Non-clinical Assessment Delegate should exercise due care to ensure the assessment is complete, evidence based, free from errors, contradictions, or omissions.

7.4.2. Clinical Assessment Delegates

Clinical Assessment Delegates are delegated the authority under the Act to approve an older person for all service groups, classification types and classification levels.

Note: Clinical Assessment Delegates can approve entry-level home support services (as non-clinical Assessment Delegates do) if assessment organisations have chosen to allocate home support assessments to Clinical Assessment Delegates.

7.5. Overview of approvals under the Aged Care Act 2024

The *Act* brings a major shift in how individuals are approved to access funded aged care services.

Before the *Act*, approvals for funded aged care services were largely program focused. Some approvals were given under the *Aged Care Act 1997*, and some were not.

The Act standardises the approval approach for funded aged care services, with all approvals given under the Act, using one service list which is divided into four Service Groups. This makes it more straightforward to give an older person a tailored package of care that meets their needs.

To be eligible for any funded aged care service an individual must first meet the criteria for an aged care needs assessment (as specified in Section 58 of the Act). Eligibility is now determined by a Triage Delegate, who holds relevant decision-making powers delegated from the System Governor.

Once determined as eligible, an aged care needs assessment is conducted to determine whether the older person requires funded aged care services. Based on this assessment, the assessor recommends funded aged care services they consider the individual needs to meet their care needs as well as any services, service types and service groups they consider the individual should be approved for under section 65 of the Act. It should be noted that under the same provision, older Aboriginal and Torres Strait Islander person only needs an approval at the level of service group to receive aged care services. These recommendations are documented in a support plan, which is issued to an assessment delegate for consideration shortly after the assessment has been completed.

For an older person to start using funded aged care services, they need to be approved for the following under the Act:

1. **Service groups,** which specify the setting and nature of care an individual can access
2. **Classification types,** which specify the different time periods that services are delivered for under the service group.
3. **Service types** and **services** (for some older people, in some circumstances) – Service types are groups of different services. The services under these types are set out under the Aged Care Service list. Different service types sit under each

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service group. Older Aboriginal and Torres Strait Islander people only need an approval at the service group level – they are automatically approved for all service types and services in that group.

4. **Classification levels,** which determine the amount of funding available to deliver funded aged care services to the individual. The individual receives a classification level for the classification type for the service group they have been approved to access. The classification levels are specified in the Rules (see Division 3 Part 3 of Chapter 2 of the Rules).
5. **Priority categories** – determines priority for a classification type for a service group.

An assessment delegate will make approval decisions for all of these elements, with the exception of priority categories, which may be made by or with the assistance of an algorithm.

Note: individuals must be approved under the *Aged Care Act 2024* to access any **funded aged care** services, including if they are delivered through CHSP, MPSP and NATISFACP. This is a significant change as individuals could previously access services through these programs without approval under the *Aged Care Act 1997*.

7.6. Delegate decisions under the Aged Care Act 2024

Although assessors provide recommendations and supporting evidence via the assessment report (support plan), the final approval decision rests solely with the Assessment Delegate.

While Assessment Delegates exercise the powers of the aged care System Governor, they remain personally accountable for the decisions they make under the *Aged Care Act 2024* (the Act). This underscores the significant responsibility of the Assessment Delegate role.

Once an aged care needs assessment is finalised, the Assessment Delegate must ensure that all eligibility requirements are met before approving any service group, service type, or specific funded aged care service. This means that the older person's situation must comply with the conditions outlined in sections 65-68 of the Act and any additional eligibility criteria set by the relevant rules must be satisfied. If these requirements are not met, the Assessment Delegate cannot approve the provision of aged care services.

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7.6.1. Deciding if the older person requires aged care services

Assessment Delegates must first determine whether the individual requires access to funded aged care services, and which service groups, and in some cases service types and services they require. This requirement is set out in section 65(2) of the *Aged Care Act 2024* (the Act).

This decision is made based on:

- An assessment report (referred to in practice as the support plan),
- In the case of reassessments in accordance with 64(1)(c)(ii) of the Act, any relevant information relating to the individual provided.

The table below summarises the sections of the Act that relate to eligibility for access to services. These sections of the Act, and how they apply to an Assessment Delegate's decision-making, are explained in detail in the following sections.

Table 33: Approval to access funded aged care services under section 65

Section criteria of the Act		Available service group/s	Available classification type/s	Relevant program/s
66	Individual must be an Aboriginal or Torres Strait Islander person The individual must meet any eligibility requirements prescribed by the rules for the relevant service group.	• Residential Care • Home Support • Assistive Technology • Home Modifications	All classification types	All programs.
67	Individual must have an impairment; **and** There must be a specific reason why the individual requires access to the service type/s or services. The individual must meet any eligibility requirements prescribed by the rules for the relevant service group.	• Home Support • Assistive Technology • Home modifications	All classification types	• Support at Home • CHSP • TCP • MPSP • NATSIFACP
68	Individual must have a continuing need for residential care because they are 'sick' The individual must meet the eligibility requirements prescribed by the rules for the service group residential care.	• Residential Care	All classification types	• Residential care (ongoing or short-term) • TCP • MPSP • NATSIFACP

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Figure 7 below provides a visual summary of the three pathways to access approval (sections 66, 67 and 68).

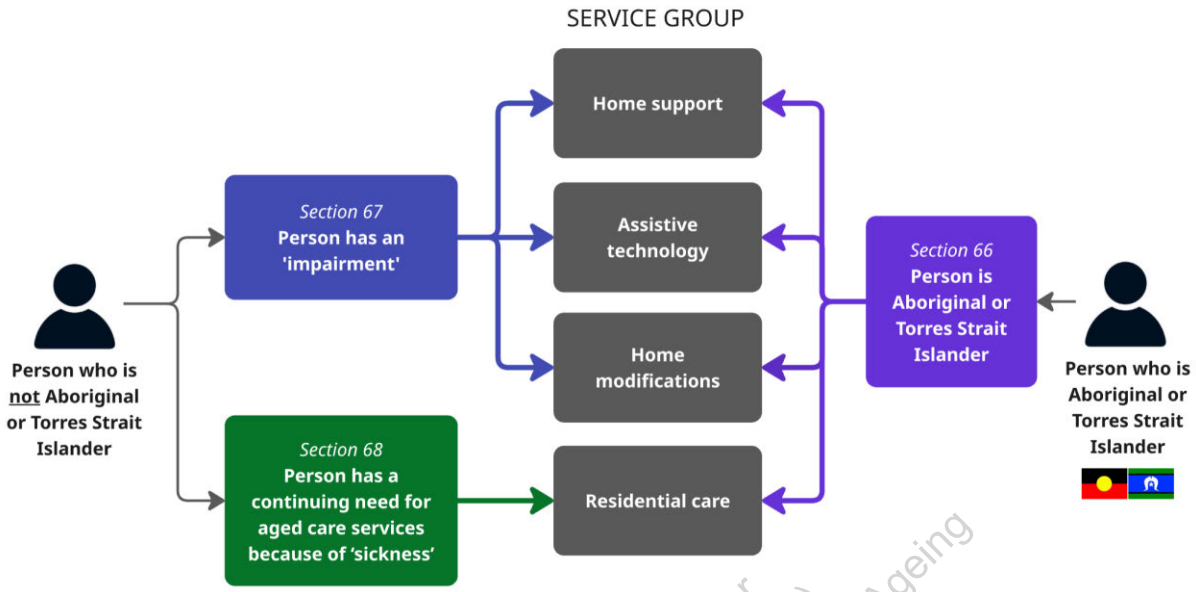

Figure 7 – Overview of pathways to approval for service access under the Act

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7.6.2. Section 66 – Aboriginal or Torres Strait Islander persons

Section 66 provides a special pathway for individuals who are Aboriginal or Torres Strait Islander to be approved under section 65(1) to access funded aged care services. This pathway is unique for Aboriginal and Torres Strait Islanders because it relies on a different power in the Constitution to the other eligibility for approval provisions.

Under section 66, an older person who is an Aboriginal and Torres Strait Islander can be approved under section 65(1) for any service group, which includes all of the service types and services in the group.

Figure 8 below gives an overview of the section 66 pathway to access approval for older people who are Aboriginal or Torres Strait Islander.

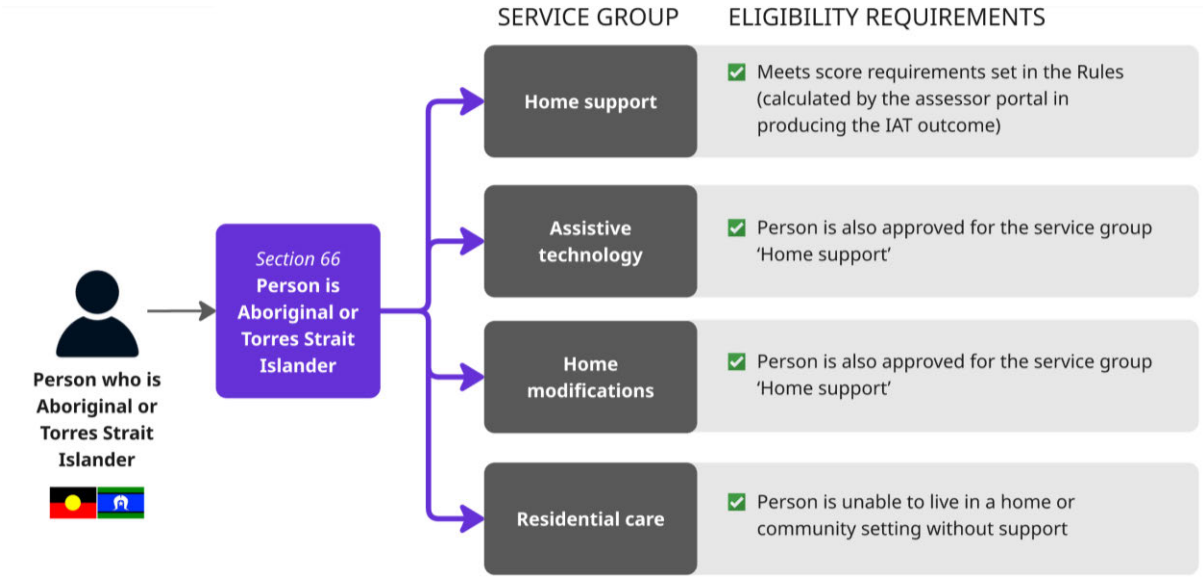

Figure 8 – Overview of section 66 pathway to approval for service access

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Additional eligibility requirements

While an older person who is an Aboriginal or Torres Strait Islander can be approved at the service group level for any service group, delegates will still need to take into account the additional eligibility requirements in the Aged Care Rules 2025 (the Rules)for the service group (or groups) the person is actually approved for (section 65-10 to section 65-20 of the Rules). This is required because of section 65(3) of the Aged Care Act 2024.

The additional requirements for each service group are set out below.

Additional eligibility requirements for home support

The system will calculate the score necessary to determine whether an older person has met the additional eligibility requirements for the home support service group listed below. This calculation is made by drawing on the responses from within the Integrated Assessment Tool (IAT). The role of an Assessment Delegate is to ensure information is accurately recorded in the IAT and to have consideration for the legislative eligibility criteria even though the score is calculated by the system.

The additional requirements for the home support service group are that the person meets any of the 'score' requirements for the particular questions in the IAT. These are outlined in the table below.

Table 34. Additional eligibility requirements for the home support service group under section 66

A person has a total score of less than 20 for the questions in the IAT with the following headings:	• Climb stairs • Eating • Dressing • Take a bath or shower • Grooming • Transfers • Toilet use

	• Toileting – bladder • Toileting – bowels • Walk
OR	
The person has a total score of less than 14 for the questions in the IAT with the following headings:	• Get to places out of walking distance • Undertake housework (heavy/moderate) • Go shopping (assuming transportation) • Prepare meals • Take medicine • Handle money • Use the telephone
OR	
The person has a score greater than zero for the questions in the sections of the IAT headed:	• Cognition • Medical and Medications
OR	
The individual has a score greater than zero for questions in the section of the IAT headed:	• Psychological
OR	
The individual has a score greater than zero for the questions in the section of the IAT headed:	• Physical, Personal Health or Frailty

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Additional eligibility requirements for assistive technology and home modifications

- the individual is also approved for the home support service group.

Additional eligibility requirements for residential care

- the individual is incapable of living in home or community setting without support.

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7.6.3. Section 67 – a person who has an impairment or sickness

Section 67 is the pathway for older people (who are not Aboriginal or Torres Strait Islander) to be approved under section 65(1) for the following service groups:

- home support
- assistive technology
- home modifications.

There are special requirements for approving a person where section 67 applies to them, because of the legal basis in the Constitution that supports the approvals.

When approving a person for service types or particular government-funded aged care services because section 67 applies to them, it is not possible to approve them at the service group level. Assessment Delegates will need to select and decide the particular service type/s the older person requires, or for particular service types the individual service/s (further information below). This is a necessary legal requirement because of the constitutional powers that support the provision of these types of services under the *Aged Care Act 2024 (the Act)*.

Figure 9 below gives an overview of the section 67 pathway to access approval.

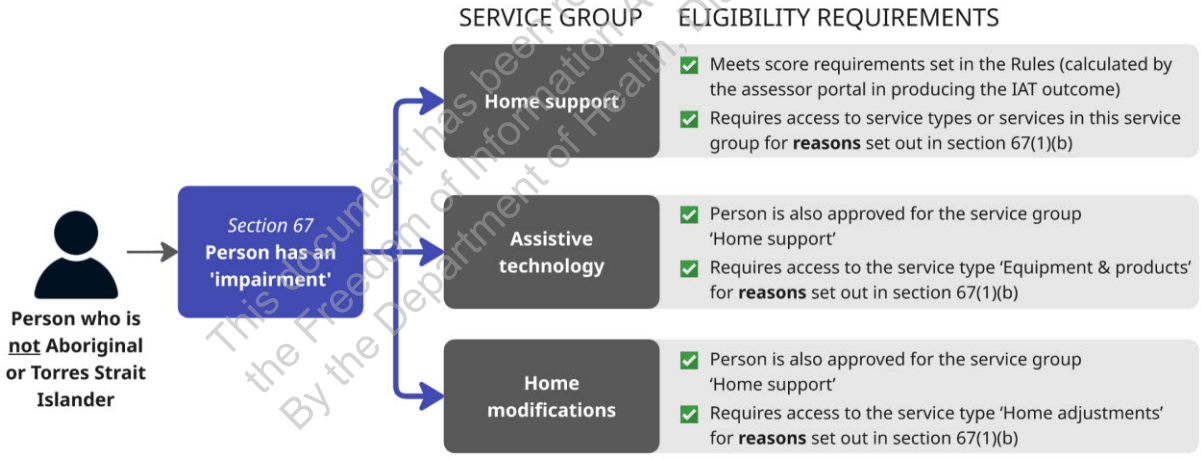

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Figure 9 – Overview of section 67 pathway to approval for service access

Deciding if the person should be approved

When deciding if an older person should be approved for the Home Support, Assistive Technology or Home Modifications service group/s under section 65 of the Act where section 67 applies to them, Assessment Delegates will need to take the following steps:

1. Assessment Delegates must be satisfied that the older person has a disability or an "impairment"

    a. the impairment must be long-term and be a physical, mental, sensory or intellectual impairment, and

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b. because of its interaction with various barriers, the impairment may hinder the person's participation in society on an equal basis with others.

2. Decide which service types the older person requires access to.

   a. For the service types 'Allied health and therapy' and 'Therapeutic services for independent living' an Assessment Delegate must also decide which individual services in those service types they require access to.

3. Assessment Delegates must then be satisfied that there is a specific reason why the person requires access to the service types (or the particular funded aged care services – see step 2a.). These reasons are set out in section 67(1)(b) of the Act and explained further below.

4. Assessment Delegates must also be satisfied that the person meets the additional eligibility criteria in the Rules. These criteria are outlined below.

Impairment

Information about the person's "impairment" will already be reflected in the information collected using the Integrated Assessment Tool (IAT) and any other relevant information gathered during the assessment, such as information from the person's GP or other health records. For the purposes of recording the approval decision, an Assessment Delegate will need to be satisfied the information provided identifies the long-term impairment (or impairments) that the older person has. This should be evident from the assessment information.

It should also be evident from the assessment/IAT/Support Plan information the barriers the person faces to their independence because of their impairment and how this impacts their ability to participate and be included in the community.

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EXAMPLE 1

The older person may be physically impaired because of a musculoskeletal disorder or be vision impaired, which was identified through their assessment and recorded in the IAT, or evidenced in a record or report for the person provided by a GP or other health professional. This may impact, among other things, their functional ability and be recorded under the Function section of the IAT.

EXAMPLE 2

The older person may have a diagnosis of a pre-existing condition, such as arthritis or another physical or neurological condition, such as dementia or Motor neurone disease, as identified through their assessment in the IAT. This may be recorded as a health condition under the Medical and medications section.

For both above examples, the older person's condition may impact their ability to participate in the community, as they would require support to enable them to continue living at home and maintain their independence.

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Special requirements for 'Allied health and therapy' and 'Therapeutic services for independent living'

When approving an older person for the service types 'Allied health and therapy' and 'Therapeutic services for independent living', Assessment Delegates will need to consider which individual service (or services) in the service type the person requires access to because of their needs.

This is because each funded aged care service that is considered an allied health, therapy or other therapeutic service is directed at a different physical, functional or cognitive issue – it's not possible to determine that a person with disabilities requires access to allied health or therapeutic services *generally* without considering if each particular service is required. This is an essential requirement because of the changes to the legal basis supporting the Aged Care Act 2024 (the Act).

Specific reason/s why access is needed under Section 67

The Act requires Assessment Delegates to consider reasons why an older person needs access to the service types or particular services. Assessment Delegates must turn their minds to these reasons when deciding on the service types/services.

The reasons are that the service type (or service(s) within the service types of *Allied health and therapy* and *Therapeutic services for independent living*):

i. is an in-home, residential or community support service that is necessary to support the person to live and be included in the community and prevent them from being isolated or segregated from their community

ii. will facilitate personal mobility of the person in a way that the individual chooses

iii. involves a mobility device or equipment, or assistive technology, that will facilitate personal mobility

iv. is a health service that the person needs because of their impairment or because of the impairment and the interaction with various barriers

v. is a habilitation or rehabilitation service

vi. is a service that will assist the person to access any of the services they need because of any of the reasons above

vii. will minimise the prospects of the person, or prevent the person from, acquiring a further impairment

viii. is a medical service required by the person because of sickness.

For ease of understanding, these have been re-framed as needs of the older person in the table below (this is how they appear in the Notice of Decision).

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Table 35. Reframed reasons for access under section 67

It has also been determined that you require access to the stated service types and/or services because you …
require support to live and be included in the community and prevent you from being isolated or segregated from their community [doesn't apply to the Nursing service type]
require support with your personal mobility
would benefit from services to minimise the chances of you, or prevent you from, acquiring a further impairment
require support with rehabilitation or to gain a new skill or function (also known as habilitation)
require health services because of your impairment or because of the impairment and its interaction with various barriers
need support to access any of the services you have been approved for

When making a decision, Assessment Delegates must consider the older person's circumstances overall and what service types and services they need, and for what reason. This should already be evident from the information recorded in the Integrated Assessment Tool (IAT) or the Support Plan, which detail what the person's needs are, and why the person needs support and what help they need.

Service types/services and potential applicable reasons are set out in the table on the following page.

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Table 36. Service types/services and potential applicable reasons under section 67

Reason	Home Support	Assistive Technology (Only has one service type)	Home Modifications (Only has one service type)
1. Requires support to live and be included in the community and prevent from being isolated or segregated from their community	All service types except Nursing	Equipment & Products	Home Adjustments
2. Requires support with personal mobility or requires a mobility aid/device/assistive technology	Transport	Equipment & Products	Home Adjustments

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Reason	Home Support	Assistive Technology (Only has one service type)	Home Modifications (Only has one service type)
3. Would benefit from services to minimise the prospects of them, or prevent them from, acquiring a further impairment	Assistance with transition care	Equipment & Products	Home Adjustments
4. Needs support to access any of the services they have been approved for	• Assistance with transition care • Restorative care management	Equipment & Products	
5. Requires health services because of their impairment or because of the impairment and its interaction with various barriers	• Allied health and therapy services[4] • Nursing care • Therapeutic services for independent living[5]		
6. Requires support with rehabilitation or to gain a new skill or function (habilitation)	Assistance with transition care		

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Once an Assessment Delegate has considered which service types are needed and why, they need to record the reasons for their decision in the Notice of Decision. Assessment Delegates will be required to delete the reasons which they consider do not apply from the list of reasons above.

Health services - examples

An example of a health service is physiotherapy or other services delivered by a registered health professional.

An example of approving access to a service because it is a 'health service' required 'because of the individual's impairment' could be approving them for the service 'Physiotherapy' in the 'Allied health and therapy service type'. This is because the physiotherapy is required to support them with managing their diagnosis of Motor Neuron disease.

[4] Remembering that for this service type you will need to decide the individual service (or services) the older person needs and turn your mind to the reason why they need that particular service (or services).
[5] Remembering that for this service type you will need to decide the individual service (or services) the older person needs and turn your mind to the reason why they need that particular service (or services).

Habilitation and rehabilitation services - examples

Allied health services such as occupational therapy or physiotherapy are examples of habilitiation or rehabilitation services.

An example of approving access to a service because it is a 'habilitation or rehabilitation service' could be approving them for 'Acupuncture' in the 'Therapeutic services for independent living' service type, to support them in rehabilitation following a stroke.

Additional eligibility requirements

When approving a person under section 65(1) because section 67 applies to them, Assessment Delegates will also need to turn their mind to the additional eligibility requirements in the Aged Care Rules 2025 for the service groups the person is actually approved for. This is required because of section 65(3) of the *Aged Care Act 2024*.

The additional requirements for each service group are set out below.

Additional requirements for home support

The system will do the work in calculating the score necessary to determine whether an older person has met the additional eligibility requirements for the home support service group listed below. This calculation is made by drawing on the responses from within the Integrated Assessment Tool (IAT). The Assessment Delegate is to ensure information is accurately recorded in the IAT and that you have consideration for legislative eligibility criteria even though the score is calculated by the system.

The additional requirements for the home support service group are that the person meets any of the 'score' requirements for the particular questions in the IAT, outlined in the table below.

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Table 37. Additional eligibility requirements for the home support service group under the Rules

A person has a total score of less than 20 for the questions in the IAT with the following headings:	• Climb stairs • Eating • Dressing • Take a bath or shower • Grooming • Transfers • Toilet use • Toileting – bladder • Toileting – bowels • Walk
OR	
The person has a total score of less than 14 for the questions in the IAT with the following headings:	• Get to places out of walking distance • Undertake housework (heavy/moderate) • Go shopping (assuming transportation) • Prepare meals

The person has a score greater than zero for the questions in the sections of the IAT headed:	• Take medicine • Handle money • Use the telephone OR • Cognition • Medical and Medications
The individual has a score greater than zero for questions in the section of the IAT headed:	OR • Psychological
The individual has a score greater than zero for the questions in the section of the IAT headed:	OR • Physical, Personal Health or Frailty

Additional requirements for assistive technology and home modifications:

- the individual is also approved for the home support service group.

7.6.4. Section 68 – 'individuals with a sickness'

Section 68 is the pathway for older people (who are not Aboriginal or Torres Strait Islander) to be approved under section 65(1) for funded aged care services in residential care.

This covers the residential care service group which includes both permanent (ongoing) and respite (short-term) residential care. It also covers older people who will access funded aged care services through the residential care service group under the Transition Care Program (TCP).

Approving a person for the residential care service group because section 68 applies to them will automatically approve them for all residential care service types, including the services under those types.

Figure 10 below gives an overview of the section 68 pathway to approval to access the residential care service group.

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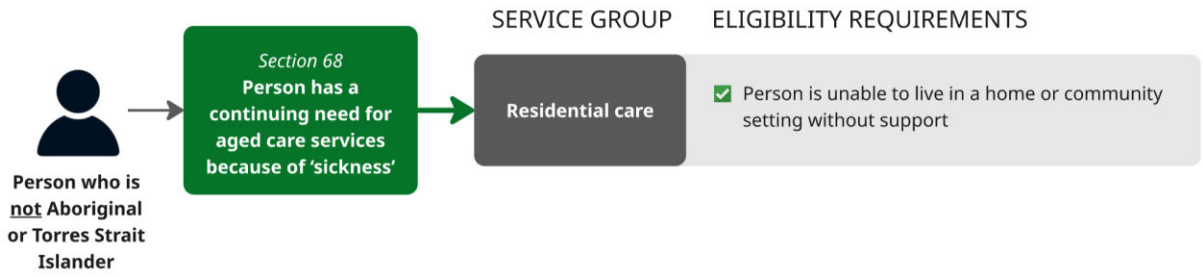

Figure 10– Overview of section 68 pathway to access approval for residential care

Deciding if the person should be approved

When approving an older person for the residential care service group, Assessment Delegates will need to be satisfied that:

1. the person is "sick", and
2. Because of their "sickness", they have a continuing need for residential care services, including nursing services.
3. The person meets the additional eligibility criteria in the Rules. These criteria are outlined below.

Sickness

"Sickness" for the purposes of the *Aged Care Act 2024* (the Act) means an infirmity, illness, disease, incapacity or impairment. Sickness can be a strictly physical illness, such as a heart condition but will also encompass mental health conditions like depression or anxiety, or neurological disorders, such as dementia or Alzheimer's.

Information about the person and their "sickness" will already be reflected in the information collected using the Integrated Assessment Tool and any other relevant information gathered during the assessment, such as information from the person's GP or other health records. For the purposes of recording the approval decision Assessment Delegates will need be satisfied the information provided identifies that the older person is "sick" and because of that they have a continuing need for residential care, including nursing services. This is a necessary legal requirement because of the constitutional powers that support the provision of residential care under the Act.

The requirement that the person is sick and has a "continuing need" for residential care "including nursing services" applies in the same way to respite care (short-term) and Transition Care (hospital transition) as it does to permanent (ongoing) residential care. While the person will only be approved to access care for a limited period of time if they are approved for respite or Transition Care, Assessment Delegates will still need to be satisfied they are sick enough at the time of the assessment that they have a continuing need for residential care including nursing services.

Additional eligibility requirements

When approving a person for the residential care service group because section 68 applies to them, Assessment Delegates will also need to turn their mind to the additional eligibility requirement in the Rules. This is required because of section 65(3) of the Act.

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The additional requirement is:

- the person is incapable of living in a home or community setting without support.

7.7. Approvals for service groups, classification types and classification levels

The foundational building blocks of approvals under the *Aged Care Act 2024 (*the Act) are service groups, classification types and classification levels.

- Service groups specify the setting and nature of care an individual can access. There are four service groups: home support, assistive technology, home modifications and residential care.
- Classification types differentiate the time period that services are delivered for under the service group. There are three classification types: ongoing, short-term and hospital transition. Each classification type has a different purpose in meeting the needs of an individual and so are funded and timed accordingly.
- Classification levels determine the amount of funding available to deliver the aged care services that an individual has been approved to access under a service group.

Under the Act *,* approvals for a service group, a classification type and a classification level combine to create something that is comparable to an approval for a program under the *Aged Care Act 1997*.

The table below compares some examples before and after the introduction of the Act.

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Table 38. Comparison of approvals under the Aged Care Act 1997 and Act Care Act 2024

Before the introduction of the *Aged Care Act 2024*	**After the introduction of the *Aged Care Act 2024*, the older person is approved for⋯**
Home Care Package Level (1-4)	**Service group:** Home support **Classification type:** Ongoing **Classification level:** SAH (Support at Home) Class (1-8)
Commonwealth Home Support Package (CHSP)	**Service group:** Home support **Classification type:** Ongoing **Classification level:** CHSP Class
Residential respite care	**Service group:** Residential care **Classification type:** Short-term **Classification level:** Respite Class (1-3)
Short-term Restorative Care Programme	**Service group:** Home support **Classification type:** Short-term **Classification level:** SAH Restorative Care Pathway

The following sections show the possible combinations of classification type and classification level a person can be approved for under each service group.

Decisions for service group and classification type are made under section 65(2) of the Act. Decisions for classification level are made under section 78 of the Act.

7.7.1. Service group: Home support

Table 39. Possible combinations of classification type and classification level under the service group of home support

Service group	**Classification type**	**Classification level**
Home Support	**Ongoing**	CHSP class Support at Home (SAH) class 1 to 8
	Short-term	SAH restorative care pathway SAH end-of-life pathway
	Hospital transition	Home Support Hospital Transition class (HS HT class)

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7.7.2. Service group: Assistive technology

Table 40. Possible combinations of classification type and classification level under the service group of assistive technology

Service group	Classification type	Classification level
Assistive technology	**Ongoing**	assistance dogs
	Short-term	AT CHSP AT low AT medium AT high
	Hospital transition	AT HT class

Note that classification levels are also referred to as 'funding tiers' in the Support at Home program.

7.7.3. Service group: Home modifications

Table 41. Possible combinations of classification type and classification level under the service group of home modifications

Service group	Classification type	Classification level
Home modifications	**Short-term**	HM CHSP HM low HM medium HM high

Note that classification levels are also referred to as 'funding tiers' in the Support at Home program.

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7.7.4. Service group: Residential care

Table 42. Possible combinations of classification type and classification level under the service group of residential care

Service group	Classification type	Classification level
Residential Care	**Ongoing**	Class 0 Class 1 to Class 13
	Short-term	Class 0 Respite class 1 to Respite class 3
	Hospital transition	RC HT class

Note that 'Class 0' is a default classification applied before the client has been assessed for their classification level.

7.8. Approvals for service types and services

The Aged Care Service List is defined in the Aged Care Rules 2025. It lists the four service groups, and the service types and services within them.

Important:

If the older person is an Aboriginal or Torres Strait Islander person, an Assessment Delegate only needs to approve them for one or more service groups. They are automatically approved for all the service types and services in any service group they are approved for.

If the older person is not an Aboriginal or Torres Strait Islander person, and an Assessment Delegate is approving the Home Support, Assistive Technology or Home Modifications service groups, they must decide:

- which **service types** to approve them for within each service group
- which **services** to approve them for, but **only if they are being approved for the following 'prescribed' service types**: *Allied health and Therapy* and *Therapeutic Services for Independent Living.*

Note:

If an Assessment Delegate is approving an older person for any service type other than the 'prescribed' service types (Allied health and Therapy and Therapeutic Services for Independent Living), they are also approved for all services in that service type.

Any older person approved for the residential care service group, is automatically approved for **all service types and services in that service group.**

Section 65(2) of the Act has more information about these requirements.

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7.9. Approvals for priority categories

Priority categories are assigned to individuals (under section 86 of the Aged Care Act 2024 (the Act)) to determine when certain services are allocated under section 92 of the Act. These categories are based on the assessed urgency of need, complexity of care requirements and potential risks associated with delayed support.

The Assessment Delegate does not make decisions on priority category under the Act. Priority categories are assigned by the system (assessor portal). However, Assessment Delegates are responsible for ensuring the correct information is used to calculate any priority category and communicating any priority category decision to the older person.

Under Section 86 of the Act, the Assessment Delegate is required to assign a priority category for an individual for the following service groups and classification types:

- Home support – ongoing (excluding CHSP class)
- Assistive technology – ongoing and short-term
- Home modifications – short-term
- Residential care – ongoing

In practice, this looks like the following:

1. The aged care needs assessment is carried out.
2. A priority category is calculated and assigned by the system (**not** the assessor) at the end of an assessment. In some cases, there is only one applicable priority category.
3. The Assessment Delegate confirms the information that has been used to calculate the priority category.
4. The priority category is pre-populated into the Notice of Decision (the assessment outcome letter).

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Approvals for Transition Care, End-of-Life Pathway, Restorative Care Pathway, short-term residential care (respite care) and CHSP class do not require a priority category. The Notice of Decision template marks the priority category for these as 'N/A', you should leave these fields unchanged.

The below table summarises the service groups, classification types, classification levels and priority categories covered in this section.

Table 43. Priority categories for service groups, classification types and classification levels

Service group	Classification type	Classification level *Referred to as funding tiers' for AT and HM*	Priority category
Home support	Ongoing	SAH class 1 SAH class 8	Urgent, High, Medium, Standard
	Ongoing	CHSP class	N/A

Service group	Classification type	Classification level *Referred to as funding tiers' for AT and HM*	Priority category
	Short-term	SAH restorative care pathway SAH end-of-life pathway	N/A
	Hospital transition	HS HT class	N/A
Assistive technology	Ongoing	assistance dogs	Immediate, High, Medium, Standard
	Short-term	AT low AT medium AT high	Immediate, High, Medium, Standard
		AT CHSP	Immediate
	Hospital transition	AT HT class	N/A
Home modifications	Short-term	HM low HM medium HM high	Immediate, High, Medium, Standard
		HM CHSP	Immediate
Residential care	Ongoing	Class 0 (pre AN-ACC assessment) Class 1 to Class 13	Priority One, Priority Two, Priority Three
	Short-term	Class 0 (pre AN-ACC assessment) Respite class 1 to Respite class 3	N/A
	Hospital transition	RC HT class	N/A

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7.9.1. Home support – ongoing

The priority category for ongoing Support at Home is calculated based on six different criteria captured in the (Integrated Assessment Tool (IAT) or on the client's record. These are whether the person:

1. lives alone
2. identifies as Aboriginal or Torres Strait Islander
3. has an assessed cognitive impairment
4. is experiencing homelessness or is at risk of homelessness
5. requires urgent service provision
6. has waited more than six months from the initial assessment referral and lives in a regional or remote area.

7.9.2. AT-HM scheme

The Priority categories for AT-HM is calculated based on 5 different criteria captured in the Integrated Assessment Tool (IAT) or on the client record. These are whether the person:

1. lives alone
2. has an assessed severe mobility impairment
3. Identifies as Aboriginal or Torres Strait Islander person
4. current place of residence poses a severe risk to their health or safety
5. Individual has waited more than 6 months from initial referral and resides in a rural or remote area categorised under MM5-7.

Further information is available in the AT-HM scheme guidelines.

The priority category for all ongoing CHSP services will be 'Not applicable'.

7.9.3. Residential care

The priority category for Residential Care is calculated based on 5 different criteria captured in the IAT or on the client's record. The criteria is the older person/'s:

1. identifies as Aboriginal or Torres Strait Islander
2. is experiencing homelessness
3. resides in a rural or remote area (MM 5 to 7)
4. has entered residential care through emergency circumstances
5. Urgency rating for residential care

7.10. Period of effect of approvals

Each access approval, classification level, and priority category has a period of effect that is prescribed under the Aged Care Act 2024 (the Act),. This means that access approvals remain in effect for the period of time specified by the Act, unless the approval is revoked or a reassessment occurs resulting in a new approval.

In addition to the other legislative requirements, for an older person to receive funded aged care services they need both:

- An access approval that is in effect (or 'active') and

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- A classification level that is in effect

Periods of effect for an approval decision made by Assessment Delegates are detailed in sections 71, 80 and 89 of the Act.

7.10.1. Period of effect of access approvals

When an individual is approved for access to funded aged care services 65(2) of the Aged Care Act 2024 (the Act), the approval takes effect from the access approval date of effect specified in the Notice of Decision (as outlined in Section 70). The approval stays in effect unless it is revoked under the Act or replaced by a new decision.

In some situations, the date of the access approval specified in an individual's notice of decision can be set earlier than the date the approval was actually given, referred to as 'alternative entry' (prescribed in section 71 of the Act). This flexibility exists to accommodate situations where the individual required urgent care or access to getting an appropriate assessment was limited.

7.10.2. Period of effect of classification levels

Classification levels are in effect for the period specified in the Aged Care Rules 2025. Once the specified period has elapsed, the classification level will cease to be in effect. A classification may also cease to be in effect once another classification level comes in effect.

Written notice must be provided to an individual in accordance with section 79 of the Act which specifies the day when each classification level comes into effect. For individuals approved for the service groups home support, assistive technology or home modifications this notice is usually included in the Notice of Decision provided under section 70 of the Act.

Some classification levels, such as *CHSP class*, come into effect on the access approval date of effect. Others, such as the residential care classification levels, do not come into effect until the service provider notifies Services Australia that service has commenced.

The Rules also prescribe that, for some classification levels, the maximum period of effect may be extended. The criteria and requirements for granting such extensions are prescribed within the rules under the Act.

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7.10.3. Period of effect of priority categories

When the priority category for a classification type for a service group is decided, this determines the level of priority for accessing those services.

An individual's priority category for a classification type for a service group takes effect immediately from when the prioritisation decision is made and remains in effect until either:

- The individual is allocated a place for that classification type and service group (under section 92), or
- A new priority category decision is made for that classification type for that service group following a reassessment of the individual (as per subsection 86(1) and paragraph 61(1)(b)).

7.11. Reassessment of a classification level

Depending on the classification type for service group, an individual or a registered provider acting on behalf of the individual may have the right to apply for a reassessment of a classification level under section 82. Section 82 of the Act outlines who may apply for a classification assessment for each classification type for a service group and when an application may be made. This is outlined in the table below.

Table 44. Circumstances when a classification reassessment can be sought

Classification type for a service group	Who can apply for a classification reassessment	When can a classification reassessment be sought
Ongoing or short term for home support, assistive technology or home modifications	The individual	If: • the classification type is in effect for the individual; and • the individual considers a different classification level in the classification type for the service group should be approved; and • the funded aged care services are not being delivered under a specialist aged care program; and • you consider the circumstances (if any) prescribed by the rules apply.
Ongoing for residential care	The individual A registered provider on behalf of the individual	If: • The registered provider is delivering ongoing funded aged care services to the individual through the service group in an approved residential care home; and • the applicant considers a different classification level in the classification type for the service group should be approved for the individual; and • the funded aged care services are not being delivered under a specialist aged care program; and • either of the following apply: o if the rules prescribe a time period—not more than the number of applications prescribed by the rules have been made for the individual under subsection 82(2) of the Act in that time period; o you consider the circumstances (if any) prescribed by the rules apply.
Short term for residential care	The individual	If:

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Classification type for a service group	Who can apply for a classification reassessment	When can a classification reassessment be sought
	The registered provider on behalf of the individual	• the applicant considers a different classification level in the classification type for the service group should be approved for the individual; and • an access approval is in effect for the individual for the classification type for the service group; and • if the application is made by the registered provider: o the registered provider is delivering short-term funded aged care services through the residential care service group to the individual in an approved residential care home; and o those funded aged care services are not being delivered under a specialist aged care program; and • either of the following apply: o if the rules prescribe a time period—not more than the number of applications prescribed by the rules have been made for the individual under subsection 82(3) of the Act in that time period; o You consider the circumstances (if any) prescribed by the rules apply.
Hospital transition (for any service group)	A registered provider on behalf of an individual	All of the following apply: • the registered provider is delivering hospital transition funded aged care services to the individual through the service group; and • the registered provider or the individual considers that an extension of the period of effect for the classification level that is in effect for the individual for the classification type for the service group should be approved for the individual.

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When a reassessment is needed (for all classifications except those for the residential care service group), Triage Delegates will review the application, considering the individual's current care needs and whether they still meet the requirements for a classification reassessment.

If the application meets the necessary criteria, a reassessment will be carried out, and a new recommendation will be prepared and presented to the Assessment Delegate. Assessment Delegates are responsible for deciding whether to approve a different classification level for the classification type for a service group or an extension of the classification level (if

relevant) under section 78 of the Aged Care Act 2024 (the Act),. All new decisions must be documented in a new Notice of Decision letter which must be made in accordance with the requirements of section 79 of the Act**.**

Note that a classification reassessment for ongoing residential care is commonly known as an AN-ACC reclassification and is the responsibility of Residential Aged Care funding assessors.

7.12. Summary of Assessment Delegate responsibilities under the Act

The table below summarises all of the decisions that Assessment Delegates are empowered to make or actions they are empowered to take under the Aged Care Act 2024 (the Act),. Assessment Delegate responsibilities include notifying the older person (and their registered supporter/s, if applicable) of the outcome of their assessment; this is explained in detail in the following chapter.

Table 45. Summary of decisions and actions Assessment Delegates are empowered to undertake

Decision Type	Section	Decision/Action
Access Approval Decisions	65(1)	An Assessment Delegate receives and considers an individual's support plan, deciding whether to approve access to funded services
	65(2)	An Assessment Delegate must decide whether to approve one or more service groups and the classification types for the service groups In making this decision, the Assessment Delegate must be satisfied that all the criteria prescribed in s 65(3) is met.
	65(2)	If the service group is home support, assistive technology or home modifications and the individual is not an Aboriginal and Torres Strait Islander person. An Assessment Delegate must decide: • Whether to approve one or more service types in that group • If the service type is allied health therapy or therapeutic services for independent living whether to approve one or more funded services in that type
	65(4)	In exceptional circumstances an Assessment Delegate can approve access for an individual who has not undergone an assessment if:

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Decision Type	Section	Decision/Action
		• The Assessment Delegate is satisfied exceptional circumstances apply • An individual or registered provider makes an application on behalf of the individual in an approved form • Any circumstances prescribed by the rules do not apply.
	70	The System Governor must give written notice of a decision under subsection 65(1) or (2) to the individual within 14 days after the decision is made
	71(2)	The access approval date (which is specified in the notice of decision) may be a date earlier than the access approval/notice is given. This can occur if you (as the Assessment Delegate), are satisfied: • An individual needed urgent access to funded services and there was a significant risk of harm if services were not provided before an approval was given • The individual is Aboriginal or Tores Strait Islander and at the time they were seeking services there was a lack of available assessors to undertake a culturally safe assessment • An individual commenced receiving services through a specialist program before an approval was given and at the time an individual was seeking services there was a delay in the availability of a needs assessor • And all other criteria in s71(2) are met.
	71(6)	If an application has been submitted to extend the available period to apply for an access approval under the alternative entry provisions, the Assessment Delegates must decide to: • Determine a longer period for the individual, or • Reject the application Written notice of this decision must be provided.
Classification Decision	78(1)	An Assessment Delegate must approve a classification level for the classification type and service group they have approved for the individual
	80	Section 80 requires a period of effect to be set for a classification level that has been established under section 78. The Rules allow for a registered provider to apply for an

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Decision Type	Section	Decision/Action
		extension to the maximum period of effect. The Assessment Delegate must consider the application and decide if a longer period should apply. Extensions can be sought in some circumstances for the following service groups, classification types and classification levels: • Home support, assistive technology or residential care – hospital transition • Home modifications The Rules also allow a registered provider to apply for an increase in the number of days for the classification level for the service group residential care, classification type short-term. An Assessment Delegate must consider the application and decide whether to approve an additional 21 days for the classification level because you are satisfied it is necessary because of any of the following: • Carer stress • Severity of the older person's condition • Absence of the older person's carer • Any other relevant matter
Registration and cancellation of a supporter	37(1)	A decision to register a person as a supporter of an older person seeking or receiving aged care services. For Assessment Delegates, this responsibility does not include the registration of a person as a supporter without the consent of the older person, nor where the prospective supporter has declared a conflict or there is anything else to suggest they may not be able to comply with the supporter duties (e.g., the prospective supporter had a previous supporter relationship cancelled). In these circumstances, the Assessment Delegate should progress the request to register the supporter relationship to the delegate team responsible for supporters.
	37(7)	The System Governor may make a registration under section 37(1), in the circumstances described, verbally or in writing.
	52	Cancellation of a supporter's registration upon request of the registered supporter. This applies to supporter, supporter lite and supporter guardian relationships.
	53(1)(a)	Cancellation of a supporter's registration upon request of the older person, where the registered supporter is not also an

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Decision Type	Section	Decision/Action
		active, appointed decision maker for the older person (that is, a person captured by section 28(2)) – meaning it is **not** a supporter guardian relationship).
	54	The System Governor must give written notice of a decision to cancel a supporter's registration under sections 52 or 53(1)(a) to the person whose registration has been cancelled and the older person. The notice must be given as soon as practical after the registration is cancelled and include the reasons for the decision.

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8. Chapter 8: Delegate decisions in practice

What you'll find in this chapter

This chapter includes guidance for Assessment Delegates covering:

- how to make sound, evidence-based decisions
- step-by-step processes for approving aged care services across the service groups
- other approvals (including giving approvals after a service has commenced and approving a service without an assessment).

All sections in this chapter are new content

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8.1. Decision-making fundamentals

Effective decision-making requires sound judgment, evidence-based reasoning, and a commitment to fairness and accountability.

8.1.1. Essentials of good decision-making

Delegates need to exercise independent judgment when determining whether an individual is eligible to be approved for funded aged care services. Delegate decisions must be based on all relevant information obtained through the assessment process. Delegates are considered to possess the necessary skills and expertise to fulfil this delegated role with honesty, integrity and accuracy.

To minimise the risk of errors and ensure consistency in decision-making, Delegates should adhere to the following key principles:

- **Identify all material facts:** Delegates must establish all material facts that are essential to the decision. Only facts supported by reliable evidence should be taken into account.
- **Base decisions on evidence:** Avoid making decisions based on unsubstantiated facts. Every finding must be backed by relevant and logical evidence that clearly supports the conclusions.
- **Ensure reasonable judgement:** Delegate decisions must be reasonable and not be based on findings that are manifestly unreasonable. This means that the conclusions should be rational, defensible, and clearly justifiable.
- **Observe natural justice:** Delegates must respect the principles of natural justice throughout the decision-making process. In essence, this means ensuring that individuals are given a fair opportunity to explain their circumstances before a decision is made.

- **Comply with legal requirements:** Delegates must comply with any statutory obligations, including understanding the important new eligibility criteria for approvals and the requirement to provide a written statement of reasons when necessary.

8.1.2. Best practice guides for decision-making

To support Delegates in this role, the Administrative Review Council (ARC) has developed a series of Best Practice Guides. These guides serve as both a training resource and a reference tool for primary decision-makers in Commonwealth agencies, including Delegates. They cover key aspects of decision-making and provide practical guidance to help you make sound, evidence-based decisions.

You can refer to the five ARC Best Practice Guides on the Attorney-General's Department website.

ARC Best Practice Guides : Administrative Review Council publications | Attorney-General's Department

Note:

The Administrative Review Council (ARC) published the Best Practice Guides prior to 2015. While they continue to be regarded as sound policy, it is important to note that they have not been updated to reflect any changes in case law or relevant legislation since their publication.

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8.2. Quality assurance

Delegates play a crucial quality assurance role within the aged care needs assessment system. It is the Delegate's responsibility to ensure that due process is followed. Delegates are responsible for ensuring that the person being assessed genuinely requires government-funded aged care services. Additionally, Delegates must ensure that any missing information or gaps in the required evidence have been identified, followed up, and clarified with the assessor. This is essential to support accurate, well-informed delegate decisions and uphold the integrity of the assessment process.

It is essential that Assessment Delegates maintain accuracy and consistency in their practice. Assessment Delegates can do this by:

- Regularly consulting the Aged Care Assessment Manual
- Adhering to the Aged Care Assessment Quality Framework to ensure continuous monitoring and enhancement of assessment practices in alignment with the Framework's goals.
- Seek guidance in situations that are complex or uncommon e.g. from a Team Leaders, Manager, Workplace Trainer, or another Assessment Delegate who can provide appropriate support and clarification.
- Understanding and adhering to the legal requirements set out in the *Aged Care Act 2024)*.

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8.2.1. Validating the assessment process and evidence

To ensure evidence-based reasoning, and a commitment to fairness and accountability, it is essential that throughout the delegate decision making process Assessment Delegates:

- Validate the assessment process
- Review the assessment evidence

Note: It is important that Assessment Delegates check that an individual's eligibility for an aged care needs assessment is thoroughly documented and supported by evidence. The Corrections and Reconsiderations sections in Chapter 11 provide information on what Assessment Delegates should do if you have concerns about their eligibility for an aged care needs assessment.

8.2.2. Validating the assessment process

Assessment Delegates must ensure that the correct assessment processes have been followed by the assessor. Section 62 of the Aged Care 2024 (the Act) *Undertaking aged care needs assessments*, sets out how an aged care needs assessment must be completed and the key components it must include.

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In line with the Act, Assessment Delegates must confirm the assessment:

- Was completed by an approved aged care assessor.
- Was completed using the Integrated Assessment Tool
- Used the appropriate assessment tools.
- Has appropriately evidenced and aligned recommended funded aged care services with the older person's immediate care needs.
- Includes a discussion with the older person about:
    - What the assessment has identified in terms of funded aged care services.
    - How recommended aged care services may assist the older person to maintain their independence.
    - The older person's strengths and motivations in setting individualised goals.
    - The next steps in their application for funded aged care services.
    - Advising the older person how they will be informed of the outcome of their application, including the expected timeframe for receiving a notice of decision, and the support available to help them make appropriate linkages to services as required.
- Involves the registered support persons, if this was required and requested by the individual.

Assessment Delegates can find further detail and guidance regarding best practice for the above steps in Chapter 5 *Assessment Activities* and Chapter 6 *Aged Care Programs* of this manual.

Note:

Supporting independence, autonomy, empowerment and freedom of choice.

During the assessment, the assessor must ensure the individual they are assessing is aware of their rights under Section 23 Statement of Rights and support them to understand and empower them to exercise these rights.

8.2.3. Review the assessment evidence

Assessment Delegates must ensure that all assessment information and documentation submitted by the assessor is accurate, relevant, and of high quality.

Assessment Delegates must carefully examine the documentation to confirm:

- It provides a thorough and clear record of the entire assessment process.
- It demonstrates the assessor's reasoning.
- The evidence presented adequately supports their recommendations for aged care services.

Assessment Delegates may return the Support Plan to the assessor if it lacks sufficient detail, contains errors, or includes inconsistencies. When doing so, Delegates must clearly outline the required amendments and ensure that appropriate quality assurance checks are completed.

Note: once the 'Finalise IAT' button is selected, the IAT becomes locked and cannot be edited by either the assessor or the Delegate.

Once the revised documentation is resubmitted, Assessment Delegates must conduct a final review to check that it meets the required quality standards before granting final approval. To support continuous improvement, Assessment Delegates should provide assessors with constructive feedback that promotes best practices and helps them understand and meet documentation expectations.

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8.2.4. Assessment information and evidence

Assessment information and evidence should include all relevant documentation that supports the recommendations and decisions made throughout the assessment process. The assessment documentation must include:

- Consent
- Integrated Assessment Tool and Validated Assessment Tools
- Emergency Residential Care - Application for Care Form (where applicable)
- Additional Evidence
- support plan and Recommendations
- Referral Information

Assessment Delegates must ensure that the assessment information contains comprehensive information to support the justification of the assessor's recommendation for funded aged care approvals. The following sections provide further detail on the requirements and how to ensure the evidence is sufficient.

Support plans

Under the Aged Care Act 2024 (the Act), two key types of reports are required when assessing an individual's eligibility and needs for aged care services: the Assessment Report (as per Section 63) and the Classification Report (as per Section 77).

In practice, these reports comprise the support plan and the finalised Integrated Assessment Tool (IAT) respectively.

The support plan and its associated areas of concern, goals, and recommendations are among the most important pieces of needs assessment documentation available to the Assessment Delegate. The support plan helps determine whether to approve an individual for access to aged care services and must contain all relevant information from the older person's aged care needs assessment.

It is essential that the assessment summary is written clearly and succinctly, following the ISBAR format–Introduction, Situation, Background, Assessment, and Recommendation see section 5.9.1 in Chapter 5.

Particular emphasis should be placed on the Assessment section, as it typically forms the most substantial part of the summary. This section should comprehensively detail the findings of the assessment, providing a clear and accurate reflection of the individual's needs and circumstances.

The support plan must be consistent with the information collected using the IAT and any other relevant information gathered during the assessment, such as GP health summaries. The assessment summary should clearly inform the goals, recommendations, and any areas of concern outlined in the support plan. These elements should reflect what the person is concerned about, what they hope to achieve or change, and how funded aged care services can support them in addressing their needs and aspirations.

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It is crucial that support plan recommendations are not just presented as a list of needs without context or explanation. Instead, the document should include clear elaborations on how each identified need was assessed and how this assessment informs the recommended care interventions or services.

When reviewing a support plan, Assessment Delegates should consider the following questions to ensure the documentation is thorough and meaningful:

- **Why is the person having a needs assessment?** - The support plan should clearly articulate the purpose of the assessment. Look for background information that explains the circumstances leading to the referral and the rationale for undertaking the assessment.
- **What are the older person's identified needs?** - Confirm that the support plan provides a comprehensive and evidence-based description of the older person's needs. This should encompass physical, medical, psychological and social domains as identified through the IAT and other validated assessment tools.
- **What types of support are required, and why?** - Ensure the support plan outlines the specific supports recommended along with a clear justification for each. These

should be directly linked to the older person's assessed needs and supported by relevant evidence.

- **What barriers are limiting the older person's independence?** – Assess whether the support plan identifies any factors, such as cognitive impairment, physical limitations, or safety risks; that prevent the older person from performing tasks independently. These barriers must be clearly connected to the recommended supports and services.
- **What are the older person's concerns and priorities?** - Ensure the support plan accurately reflects the older person's concerns, perspectives and priorities. These may relate to safety, daily living, mobility, or social participation and should be acknowledged and addressed appropriately.
- **What goals does the older person wish to achieve with support?** – Verify that the support plan includes the older person's goals and desired outcomes. Ensure recommended supports align with these goals and demonstrate respect for the older person's autonomy, preferences and aspirations.
- **Are the recommended supports appropriate and proportionate?** - Evaluate whether the recommended services are reasonable, tailored to the older person's current circumstances, and likely to achieve the intended outcome.

Once finalised, the support plan is sent to the older person, and their registered supporter/s and/or appointed decision makers as applicable, as a record of the assessment, accompanied by a Notice of Decision letter. Registered providers also use the support plan to inform the individual's care plan, therefore accuracy and clarity essential.

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Referral information

The support plan will contain referral codes for services that have been approved and listed in the Notice of Decision letter, except where the referral code has not yet been issued.[6] or used to action a referral. Referral information is a vital component of the older person's record and typically consists of documents and notes gathered from various sources during the initial screening, triage, and assessment process.

In most cases, referral information will be attached to the older person's record or documented as 'client notes' within the My Aged Care assessor portal.

It is essential to use referral information when making a decision, as it provides important context and justification for any recommendations made.

Record of consent

Assessment Delegates must ensure that consent has been properly recorded in the system before making any approval decisions.

Consent is a mandatory part of the assessment process and must reflect that the older person—or their appointed decision-maker—has agreed to the assessment and referral to services. This protects older person's rights and ensures decisions are made in accordance with legislative and procedural requirements.

[6] At the time of delegate approval, the referral code will not yet be available when the older person is awaiting funding through the Support at Home, AT or HM Priority Systems.

Application for Care form

Older people seeking access to funded aged care services will not be required to complete an Application for Care Form. The act of applying for access to services will commence through one of the existing registration pathways (i.e. the My Aged Care contact centre).

However, older people seeking access to residential care and emergency respite care will be required to complete an *Emergency Residential Care - Application for Care Form*. This form is used by providers and must be completed and uploaded to the older person's My Aged Care Record, to confirm when they commenced receiving services.

Triage Delegates must review the form for completeness and be satisfied that the requirements under s58 are met. The Assessment Delegate is responsible for reviewing and approving the application form.

See the section titled *Further guidance Application process for people who have received aged care services but not yet applied for an assessment under My Aged Care* at the end of this chapter for more information.

Integrated Assessment Tool (IAT) and Validated Assessment Tools (VaTs)

The IAT and its VATs is the prescribed tool that assessors must use under s62-5 of the Rules. The IAT is essential for capturing a comprehensive profile of an older person's needs, ensuring accuracy and consistency in decision-making. The IAT consolidates key information about an older person's needs across a number of domains, providing a holistic view of their health and circumstances. Additionally, embedded validated tools assess abilities and capacity, forming a solid evidence base for determining care needs.

Assessment Delegates must evaluate the information captured in these tools to determine an older person's eligibility for aged care services. This means cross-referencing the assessor's recommendations with the data recorded in the IAT to ensure the decision aligns with the support plan and matches the level and type of care identified during the assessment process.

If assessors choose to use any additional VATs beyond the IAT, Assessment Delegates must ensure they are uploaded as attachments to the 'client record'. This is essential for maintaining complete documentation.

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Additional evidence

Assessment evidence can come from a range of sources, including letters or emails from health professionals such as geriatricians, GPs, or social workers. Additional useful documents might include written information from family or friends, GP medical summaries, completed AT-HM tier guide, hospital discharge summaries, and correspondence from current service providers, Care Finders, Elder Care Support workers, government or non-government agencies, or others involved in the older person's care. These documents offer valuable insights into the older person's needs and may help identify the type and urgency of required care and support.

Assessment organisations may also hold regular delegation meetings to review assessed individuals and ensure a multidisciplinary approach has been applied. These meetings help guide assessors in making well-informed recommendations before support plan submission and support Assessment Delegates, in fully understanding an individual's aged care needs, enabling accurate and informed decision-making.

Note:

If Assessment Delegates have any concerns about the quality or completeness of the evidence provided, it is important they discuss these with the assessor before proceeding with approvals. Assessment Delegates may also involve a manager or team leader in this discussion, if necessary, to ensure that all aspects of the assessment are properly addressed.

8.3. Approving home support

8.3.1. 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 the Commonwealth Home Support Program (CHSP) or Support at Home (SaH). It may also recommend 'ineligible for CHSP/SaH'. 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 'ineligible for CHSP/SaH' means that the older person has not met the minimum threshold to receive ongoing home support through CHSP or Support at Home.

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8.3.2. 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 (e.g. SaH class 4 to SaH class 5, CHSP to SaH class 1, 'ineligible for CHSP/SaH' to CHSP), 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 a CHSP/SaH classification (or accept in the case of an 'ineligible for CHSP/SaH) generated by 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.

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Approving CHSP services alongside Support at Home classifications

Under the Aged Care Act 2024 (the Act), an older person cannot be approved for the Commonwealth Home Support Program (CHSP) class at the same time as any Support at Home (SaH) classification level (SaH class 1-8, SaH Restorative Care Pathway or SaH End-of-Life Pathway).

In limited circumstances, SaH participants can access additional CHSP services and assessors can issue referrals for CHSP services for individuals with a SaH classification.

See tables 27 and 28 in Chapter 6 for further details about when an individual with a Support at Home classification can be approved to access CHSP services.

Approving the SaH Restorative Care Pathway

Each financial year, 20,000 Restorative Care units of funding will be available nationally, distributed across four quarters at approximately 5,000 units per quarter. These units of funding are limited and must be carefully allocated to ensure the pathway remains sustainable and appropriately targeted to individuals with short-term restorative care needs. Assessors will be able to recommend Restorative Care Pathway (RCP) regardless of the caps on units of funding. The Assessment Delegate may not approve this recommendation if RCP units of funding have run out.

For SaH participants receiving ongoing services at the time the RCP is approved, the RCP episode can be accessed concurrently with their ongoing services. This allows individuals to continue using their ongoing services while also receiving additional, clinically focused services through RCP.

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However, it is important to ensure that services provided under RCP are complementary to ongoing services. The restorative care partner and ongoing care partner should ensure coordination of services to achieve this.

Services delivered through RCP should focus on reablement and allied health and/or nursing interventions—aimed at improving function and independence, rather than duplicating routine or maintenance care.

For those already accessing ongoing care, assessors should carefully consider ongoing needs before recommending RCP. Assessors cannot recommend a new higher classification and the RCP at assessment. This will impact a new ongoing classification entry into the SaH Priority System.

For new individuals being assessed for SaH and considered for RCP, eligibility for ongoing services will need to be determined at the end of the RCP episode. Individuals cannot be simultaneously approved for both RCP and an ongoing SaH or CHSP classifications at the time of assessment.

When selecting the RCP, an assessor will not be able to select a new ongoing classification.

For those accessing ongoing services, an assessor may select a new ongoing SaH classification OR RCP. If RCP is selected, the person will automatically retain their current classification.

Note:

The IAT will allow a CHSP classification to be overridden to RCP during a comprehensive assessment. However, assessors must **not** undertake this action and delegates must not approve assessments where this occurs. Where a CHSP classification outcome is generated, RCP cannot be recommended for approval (in line with section 81-15 of the Aged Care Rules.) An ongoing SaH classification must be generated by the IAT to override and recommend RCP for approval.

To recommend the RCP classification, the individual must have received an initial ongoing SaH classification through the IAT Outcome. This is then overridden by the assessor to recommend the RCP.

Participants assigned to the RCP who have an assessed need for AT and or HM will be allocated AT-HM funding immediately.

After a restorative care episode, a participant will undertake a reassessment to get an approval for an ongoing classification and be placed in the SaH prioritisation system, if required.

If the individual is reassessed and recommended for an ongoing SaH classification while undertaking the RCP, the restorative care episode will end immediately upon delegate approval of the ongoing SaH classification.

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Approving restorative care - guidance for Assessment Delegates

An Assessment Delegate is responsible for approving access to the Restorative Care Pathway (RCP). The Assessment Delegate can only approve someone for RCP if all eligibility criteria are met. They may consider if places are available for allocation. The assessment must clearly show that the individual is likely to benefit from short-term, multidisciplinary allied health and/or nursing support aimed at improving their function and independence. An Assessment Delegate must make sure that their decision is backed by appropriate evidence.

Note: To be approved for the RCP, the person must not be residing in permanent residential care at the time of the assessment; the older person must be residing in the home or community setting. The older person should also not be in hospital.

The Assessment Delegate is also responsible for making sure all decisions follow pathway rules, including:

- The person has not already been approved for two units of funding for Restorative Care in the past 12 months
- It has been 90 days from the maximum period of effect from a previous episode of Restorative Care.
- For the relevant transition period, delegates should also confirm if a person has accessed RCP through a Short-term Restorative Care (STRC) approval to determine eligibility for further RCP funding units.

If an additional unit of funding is requested through a Support Plan Review (SPR), the Assessment Delegate must ensure that the documentation clearly explains the reason, how it links to the person's goals, and that evidence is provided to support your decision. The Assessment Delegate's role in reviewing and approving these cases is essential to making sure the RCP is used fairly, consistently, and in line with the pathway's goals of early intervention and reablement. Availability of RCP units may also be considered.

If the participant is accessing two separate episodes of restorative care, they will need to wait at least 3 months from the end of the 16 weeks period associated with the original episode before being eligible to receive a second episode within the 12-month period.

A RCP recommendation may not be approved due to no RCP places being available for allocation. The assessor may contact the older person to discuss alternative supports for recommendation.

Note: Decisions made about RCP through the IAT are made under s65 and s78 which are reviewable decisions under the Act. Decisions made about the additional unit of Restorative Care Pathway funding through an SPR are made under section 195-3 of the Rules and are not reviewable.

Eligibility considerations and exclusions

An individual **cannot** access the Restorative Care Pathway (RCP) if they:

- Are receiving, or are eligible to receive, the End-of-Life Pathway
- Have been approved for two episodes or two separate units of Restorative Care funding within the past 12 months or have recently accessed Restorative Care (a 90

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day gap is required from the end of the 16-week period associated with the first episode of care).

- Are receiving, or are eligible to receive, services under the Transition Care Program
- Are in permanent residential aged care.

Individuals who have been approved for the RCP may access services through Multi-Purpose Services Program or National Aboriginal and Torres Strait Islander Flexible Aged Care Program, if eligible for those programs and in-line with program rules.

Assessment Delegates should be aware when a client who has an ongoing Support at Home (SaH) classification and is reassessed for the RCP there is no impact on the person's current ongoing SAH classification or position in the SaH System. A new ongoing SaH classification and RCP are unable to be recommended at the same time. Assessors and Assessment Delegates should consider a person's current ongoing needs before recommending the RCP episode. If an older person needs a new ongoing classification, they will need to be reassessed following the RCP episode (noting approval of an ongoing Support at Home classification will remove access to RCP for those already in a RCP episode).

Manual oversight of restorative care places

RCP places are capped at 20,000 units per year, managed as around 5,000 units per quarter. From 1 November 2025, system-based visibility of Restorative Care units will not be available. As a result, there will be no in-system prompts or controls to prevent the approval of RCP funding units beyond the quarterly caps. Twice-weekly reports of approvals made will be generated, allowing the Department to monitor RCP approvals and communicate with assessment organisations when approvals approach or exceed the assigned caps.

In addition to RCP approvals confirmed after 1 November 2025, those with an active Short-Term Restorative Care (STRC) approval (who did not start STRC before 1 November 2025), will have their approvals transferred into an approval for RCP.

Note for this cohort using their STRC approval to access the RCP:

they will also be accessing the RCP units of funding for the first six months from 1 November 2025.

A second unit of funding to use within a single RCP episode can be requested via a Support Plan Review (SPR) request noting the assessor will need to .

self-refer this for reassessment to grant access to a second unit of funding (see Chapter 6).

The decision to approve a second unit will be informed by evidence submitted by the provider with the SPR request. Availability of the RCP funding units may also be considered. When a request for a second unit of RCP received assessors should confirm if there is approval for STRC and RCP on the client's record. If there is approval for both, the assessor will need to confirm with the client if they entered care under the RCP after 1 November 2025 using the STRC approval. If this is the case, then the assessor must not approve a third unit of RCP funding.

If the participant is eligible to access an additional restorative care pathway they must wait at least 12 months before accessing another episode.

Assessment Delegates will need to remain acutely aware of any communication from the department regarding RCP caps to ensure they are making informed decisions. These

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communications will be the **primary tool** for identifying when RCP units are nearing exhaustion. Being responsive to these insights is essential for maintaining compliance with pathway limits and avoiding over-allocation.

Restorative care funding

The Restorative Care Pathway (RCP) provides around $6,000 of funding (one unit), for up to 16 weeks. The total amount of funding a participant uses and length of time to complete an episode can differ. Restorative care partners will consider this when developing the goal plan.

At times, participants with higher needs may require additional funding over and above the $6,000 allocated per episode. If the participant requires additional funding within a single 16-week episode, the provider can submit a request for a Support Plan Review. If certain circumstances are met, approval can be given for the additional $6,000 in funds to support the episode.

If approved, a participant can access an additional unit of funding (up to $6,000), to provide a combined total of up to $12,000 (two units), for a single episode of restorative care. If additional funding is approved, a participant will not be eligible for a further episode of restorative care within a 12-month period as they have accessed the maximum 2 units of funding within the first episode.

Important:

- The decision to approve additional concurrent funding to the RCP episode is made under subsection 195-3 of the *Aged Care Rules 2025 (the Rules)*. It is a non-reviewable decision. The criteria in the Rules includes that required evidence must be given by the participant's provider and there must be units of funding available for approval.
- The assessment delegate must send a letter to the older person (and their registered supporter/s and/or appointed decision maker/s, if applicable) notifying them of the outcome of the application for the additional funding.

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Approving the End-of-Life Pathway

The End-of-Life (EoL) Pathway is one of the short-term home support classifications under the Support at Home program. It provides 12 weeks of funded support at around $25,000 for older people who are medically assessed to have three months or less to live and have an Australian-modified Karnofsky Performance Status score of 40 or less. The pathway is designed to enable people to remain at home with appropriate care during their final stage of life.

End-of-Life Pathway form

The End-of-Life Pathway form is used to document the required medical evidence for accessing the End-of-Life Pathway under the Support at Home program. An individual seeking access to the End-of-Life Pathway must complete all relevant sections and present this form to a medical practitioner or nurse practitioner for completion. The completed form should then be submitted as part of the assessment process—either before or during triage, or assessment—and reviewed to confirm eligibility for the End-of-Life Pathway.

The Assessment Delegate is responsible for verifying the completion of this form in the older person's record when the End-of-Life Pathway has been flagged in the My Aged Care assessor portal.

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Reviewing the form will involve:

- Checking the individual's details to ensure they match the record in the portal.
- Verifying the completion of all areas of the Medical Assessment section to confirm
    - The individual has a prognosis of a life expectancy of three months or less, and
    - An Australian-modified Karnofsky Performance Status (AKPS) score of 40 or less.
    - Medical practitioner or nurse practitioner has completed and signed the form.

An individual will **not** be eligible for approval for the End-of-Life Pathway if the required criteria outlined in the medical assessment section are not met.

8.3.3. Step 3. Decide the service types and services

Older person is Aboriginal and Torres Strait Islander

If the older person is an Aboriginal or Torres Strait Islander person, the Aged Care Act 2024 (the Act) provides that they only need to be approved for one or more service groups. That is, under the Act they are automatically approved for all the service types and services in any service group they are approved for. However, an Assessment Delegate will still need to make sure that all the service types and services they are approved for are selected in the system (more guidance on this follows below).

Older person is neither Aboriginal nor Torres Strait Islander

If the older person is not an Aboriginal or Torres Strait Islander person, and an Assessment Delegate is approving the Home Support, Assistive Technology or Home Modifications service groups, they must decide:

- which service types to approve them for within each service group
- which services to approve them for, but only if the Assessment Delegate is approving the following 'prescribed' service types: *Allied health and Therapy* and *Therapeutic Services for Independent Living.*

For any service type other than *Allied health and Therapy* and *Therapeutic Services for Independent Living* (the 'non-prescribed' service types), if an Assessment Delegate thinks the older person needs any service in the service type, then they need to make sure that all services in the service type are selected.

Check to make sure the required services are selected

The system currently allows services to be de-selected in the non-prescribed service types, which leaves open the possibility that services the person is actually entitled to are left out.

Assessment Delegates need to carefully check to make sure that the all the required services have been selected. This is particularly important for any approvals given under CHSP, as the services under the service type are not pre-selected in the system.

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Recording the decision for Support at Home classes (ongoing and short-term)

This process applies if the approved classification level (labelled 'classification' in the system) is any of the following:

- SAH class 1 to 8
- SAH Restorative Care Pathway
- SAH End-of-Life Pathway.

Note:

The Support at Home AT-HM scheme is referred to as a 'short-term pathway'. Under the Act, the AT-HM scheme is enabled through the Assistive Technology and Home Modifications service groups. AT-HM can be added to an older person's support plan, if there is an assessed need, after adding one of the ongoing or short-term Support at Home classifications above.

Review CHSP service recommendations

Assessment Delegates should review any CHSP service recommendations listed. If they disagree with any of them, they should contact the assessor to discuss and amend the list if required.

At the moment, Assessment Delegates are not able to record their agreement or disagreement alongside each CHSP service recommendation in the assessor portal. An Assessment Delegate's decision to agree with the recommended CHSP services must be recorded in the Notice of Decision. If Assessment Delegates are approving the client for the CHSP classification only (that is, they are not approving any ongoing or short-term Support at Home classification), the assessor portal will not currently generate the *approval* version of the Notice of Decision. In this situation, Assessment Delegates will need to use the offline Notice of Decision (approval) template.

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8.3.4. Step 4. Confirm the priority category

Access to the ongoing Support at Home classifications (SAH classification 1 to 8) will be prioritised using information collected during the assessment process and on the client's record, through the Support at Home Priority System.

An older person's priority category will be automatically determined by the system during their aged care needs assessment based on six different criteria and assigned one of four levels. The six criteria have 'points' allocated to them, and how many points an individual has determines their eligibility for the priority category.

The AT-HM scheme has its own priority systems and this is described further under the section *Approving AT and HM under Support at Home*, below.

The six criteria captured in the IAT or on the client's record that calculate the Support at Home priority category relate to whether the person:

1. lives alone (1 point)

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2. identifies as Aboriginal or Torres Strait Islander (1 point)
3. has an assessed cognitive impairment (1 point)
4. is experiencing homelessness or is at risk of homelessness (1 point)
5. requires urgent ongoing service provision (2 point)
6. has waited more than six months from the day they applied to access services, or applied for reassessment and lives in a rural or remote area (in a Modified Monash Model category 5, 6 or 7 area) (1 point)

Although the system calculates priority automatically, Assessment Delegates should check the responses to the six fields above to make sure that the correct priority category is applied.

Note:

Assessment Delegates will not know the priority category until after they click the 'Save and Delegate' button in the portal.

The four priority categories are as follows:

Table 46. Priority categories for ongoing Support at Home classifications

Urgent	The older person has five or more points.
High	The older person has four points.
Medium	The older person has two or three points.
Standard	The older person has one or no points.

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The Priority Category will be displayed under 'Approvals for a Client' in the Assessor Portal.

If an assessor makes changes to the following fields in an older person's client profile after the priority category has been calculated and the person has been placed in the queue, the system will automatically recalculate the priority category and queue position:

- Accommodation type
- No fixed address
- Lives With
- Aboriginal and Torres Strait Islander Status

8.3.5. Step 5. Confirm service seeking status (ongoing Support at Home classifications only)

As part of the assessment process, assessors are expected to have a clear conversation with the individual about whether they are seeking to receive services through the Support at

Home program. This helps ensure the individual's current needs are met and supports fair and timely access to services for others. When individuals who are not actively seeking services through the Support at Home program remain on the Support at Home Priority System, it can cause delays for those who are ready and actively seeking services.

Before referring the client for services, the assessor should confirm with the client if they wish to seek home support from the Support at Home program and record their preference in the support plan:

- For clients seeking to access their ongoing home support through the Support at Home program, the assessor should set the service seeking preference for the ongoing SaH classification to 'seeking services'
- For clients not seeking to access their ongoing home support services through the Support at Home program, the assessor should set the service seeking preference for their ongoing SaH classification 'not seeking services'. The assessor should do this for clients who choose to access services through NATSIFACP or MPSP and so do not require services from a Support at Home provider. This option makes sure the client does not enter the Support at Home Priority System and so is not allocated funding under the AT-HM scheme.

If the older person later wants to use their ongoing SaH classification through the Support at Home program, they can change their preference and enter the Support at Home Priority System. Their wait time will be counted from their original access approval date of effect. That is, it will be as if they had stayed in the queue from their first approval. They can change their preference by:

- contacting My Aged Care
- using the My Aged Care Online Account.

Assessment Delegates are responsible for confirming that the client's preference–whether to seek or not seek services through the Support at Home program–has been accurately recorded in the support plan and that it aligns with their assessed needs.

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8.4. Approving Assistive Technology and Home Modifications under Support at Home

This section relates to approving Assistive Technology (AT) or Home Modifications (HM) under the AT-HM scheme. The AT-HM scheme is one of the short-term pathways of the Support at Home (SaH) program. To be approved for the AT-HM scheme, the older person must also be approved for home support with a SAH classification level. A later section will show how to approve AT-HM when the classification level of the older person is *CHSP class*.

8.4.1. Step 1. Decide if the older person is eligible for AT or HM

Before approving a recommendation for AT or HM, an Assessment Delegate first needs to decide if an older person requires and is eligible to access one or both of these service groups.

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Existing questions in the IAT will help to identify and determine an older person's need for AT or HM. For example, the purpose of the function section is to understand a client's functional ability, their ability to complete activities of daily living, and if the client requires further assistance with these.

As part of an Assessment Delegate's decision-making, they must consider whether the older person:

- has needs and goals that could be met through using assistive technology or home modifications, or both
- can have those needs met through the assistive technology or home modifications service groups, and therefore the products, equipment and home modifications on the AT-HM list.

8.4.2. Step 2. Approve the classification type and level (funding tier)

Assessment Delegates are responsible for approving the classification type (ongoing or short-term) and funding tier for AT and HM recommended by the assessor. Once approved, funding must be used within the 12-month period (in most instances).

A 'funding tier' for AT-HM has been implemented as a 'classification level' under the Aged Care Act 2024 (the Act). These funding tiers determine the maximum budget (except for AT high tier where there is no maximum budget) available and are valid for 12 months (in most instances) from the date the individual started care with their provider (as notified by the provider in the start notification for the person).

Individuals can access AT ongoing (assistance dogs) and short-term and HM tiers concurrently if needed and may be required to contribute financially depending on the category of support.

The cost of prescription and wrap-around services—such as delivery, setup, training, and follow-up—are also drawn from the AT-HM funding tier. Providers may charge:

- up to 10% of the cost of the item or item bundle or up to $500 (whichever is lower) on administration costs for AT.
- up to 15% of the total quoted cost of a participant's home modification or up to $1,500 (whichever is lower) on coordination costs for HM.

The AT-HM funding tier must align with the individual's assessed needs and be documented in their support plan. An Assessment Delegate's approval ensures appropriate funding allocation, program compliance, and timely access to essential supports.

Assessment Delegates must consider the costs of prescription and wrapround services when approving a funding tier.

An individual is not eligible for the AT-HM scheme if they are currently receiving permanent residential aged care.

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AT-HM scheme funding tiers

If AT or HM are approved, individuals will be assigned a funding tier for AT, HM, or both - based on their assessed needs.

Table 47. Funding tiers for both AT and HM: Low, Medium and High

Funding tier	Funding allocation cap	Funding period
Assistive technology		
Low	$500	12 months
Medium	$2,000	12 months
High	$15,000[1] (nominal)	12 months
[1] Participants can access more than $15,000 with a prescribed need.		
Home modifications		
Low	$500	12 months
Medium	$2,000	12 months
High	$15,000	12 months[2]
[2] Funding may be extended for an additional 12 months to complete complex home modifications (24 months in total) if evidence is provided to Services Australia		
Other funding		
Assistance dog maintenance	$2,000 per year	Ongoing[3]
[3] Funding for assistance dog maintenance will be automatically allocated every 12 months; however, the funding cannot accrue or rollover.		

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An AT-HM tier guide has been developed to assist assessors to make a funding tier recommendation for assistive technology and/or home modifications based on the older person's assessed need in the IAT. This includes considering their current functional ability and home environment. The guidance has been designed to consolidate the main elements of the IAT relevant to AT-HM to support assessors in choosing a funding tier. The guide will suggest a funding tier which should sit where the majority of tier indicators have been selected. Assessors should ensure their recommendations align with the participant's goals, safety, independence, and overall ability to remain living at home. They may choose to select an alternate tier if funding does not align with assessed need. Assessors can upload the document as an attachment to allow Assessment Delegates to review as supporting evidence for any funding tier recommendations made.

See Appendix H for further information regarding the AT-HM Terms and Chapter 6 for AT-HM case studies

AT-HM list

The AT-HM list sets out the equipment, products and home modifications that are available for Support at Home participants under the AT-HM scheme. The AT-HM list sits under the main Aged Care Service list, which lists all other services and service types.

The list was constructed using the internationally agreed instruments and Australian-adopted AS/NZS ISO Assistive Product- classification and terminology standard (2023) and informed by subject matter experts.

Participants may use their AT-HM scheme funding on items listed under 'Inclusions' where an assessed need is documented in their support plan. Conditional inclusions are subject to additional criteria.

Home modification items are included on the AT-HM list. Services associated with the sourcing, supply and provision of the home modification products on the AT-HM list, such as installation, fitting, council approval and planning, will also be funded through the AT-HM scheme.

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The AT-HM list includes the following categories:

- managing body functions – including pressure cushions, anti-oedema stockings and memory support products
- self-care products – including adaptive clothing or shoes and assistive products for toileting, bathing and showering
- mobility products – including walking frames, wheelchairs and lifting devices
- domestic life products – including assistive products for food preparation, eating, drinking and house cleaning
- communication and information management products – aids that assist with reading and writing, as well as alternative and augmentative communication (AAC) devices
- home modifications - including accessible showers, grabrails, fixed ramps and safety barriers.

The AT-HM list

The AT-HM scheme guidelines

8.4.3. Step 3. Confirm the priority category

The AT-HM scheme has separate priority systems to the Support at Home Priority System, as the funding is separate. The AT-HM scheme has an Assistive Technology Priority System and a Home Modifications Priority System that allocate AT and/or HM funding. An older person assessed as eligible for AT and/or HM will enter the AT-HM Priority Systems in one

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of its four priority categories (immediate, high, medium, standard). The older person will not be able to access AT-HM under Support at Home until funding has been allocated. The amount of time they wait for services will depend on the priority category they are in.

The AT-HM Priority Systems ensure the equitable allocation of funding based on standardised criteria determined using information collected by the aged care assessor through the IAT.

The criteria captured in the IAT or on the client's record that calculate the priority category are:

1. Individual lives alone
2. Individual has an assessed severe mobility impairment
3. Individual is an Aboriginal or Torres Strait Islander person
4. Individual's current place of residence poses a severe risk to their health or safety
5. Individual has waited more than 6 months from initial referral and resides in a rural or remote area categorised under MM5-7.

Individuals who are being approved for the Restorative Care or the End-of-Life pathways under Support at Home will have immediate access to any AT-HM funding allocated. Note that the system will display an AT-HM priority of 'High' in this scenario, but the funds are allocated immediately. Further information will be available in the AT-HM scheme guidelines.

Although the system calculates priority automatically, the Assessment Delegate should check the responses to the five fields above to make sure that the correct priority category is applied.

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Note the priority category will not be displayed until **after** you click the 'Save and Delegate' button in the portal. The Priority Category will be displayed under 'Approvals for a Client' in the My Aged Care Assessor Portal.

8.4.4. Step 4: Confirm service seeking status (AT-HM)

Assessment Delegates are responsible for confirming that the individual's preference—whether to seek or not seek AT-HM funding through the Support at Home program—has been accurately recorded in the support plan and that it aligns with their assessed needs.

Assessors are expected to confirm with the client if they wish to seek AT-HM funding from the Support at Home program and record their preference in the support plan.

For clients seeking AT and/or HM services through the Support at Home program, the assessor should set the AT and/or HM service seeking preference to 'seeking services'. This ensures that the older person is placed on the AT and/or HM Priority System(s).

- **For clients <u>not</u> seeking AT and/or HM services through the Support at Home program**, the assessor should set the AT and/or HM service seeking preference to 'not seeking services'. This option makes sure the client **does not** enter the AT or HM Support at Home Priority Systems, and so is not allocated funding under the AT-HM scheme. Relevant circumstances include when:

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- the client has chosen to access services through NATSIFACP or MPSP and so they do not require services from a Support at Home provider (or funding from the Support at Home program)
- the client does not want to access AT and/or HM services at this time.

There are separate AT and HM Support at Home Priority Systems with independent 'service seeking' statuses for each. This means that if the older person is approved for both AT and HM, they may seek services through the Support at Home program for one, both or neither.

If the older person later wants to access their AT or HM services through the Support at Home program, they can change their preference and enter the AT or HM Priority Systems. The older person will need to be a Support at Home participant (for ongoing home support) to do this. Their wait time will be counted from their original access approval date of effect. That is, it will be as if they had stayed in the queue from their first approval.

An older person can change their service seeking preference by:

- contacting My Aged Care
- using the My Aged Care Online Account

Note:

Participants assigned to the Restorative Care Pathway or the End-of-Life Pathway who have an assessed need for AT and HM will be allocated AT-HM funding immediately.

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8.5. Approving AT and HM under CHSP

This section relates to approving AT or HM for an older person who are also approved for ongoing home support with a classification level of CHSP class.

8.5.1. Understanding AT and HM under CHSP

Under the Aged Care Act 2024 (the Act), AT and HM services will continue to be available to older people under the CHSP. The relevant service types will be:

- **Home adjustments**: subsidised home modification services will continue to be available through the CHSP. CHSP home modification funding will be aligned to Support at Home and will increase the subsidy from $10,000 to $15,000 per annum.
- **Equipment and products (replacing GEAT):** low-cost equipment and products will continue to be available through the CHSP, with support of up to $1,000 per year in total and not per item.

Under the Act, eligible people will be approved for:

- the home support service group with a classification level CHSP class, and
- the assistive technology service group with a classification level of AT CHSP or

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- the home modifications service group with a classification level of HM CHSP.

There is only one funding level for AT or HM under CHSP – there are not multiple funding tiers as there are under the Support at Home AT-HM scheme.

The Notice of Decision template (described in detail later) will prompt you to ensure the correct approvals are included.

8.5.2. Step 1. Decide if the older person requires AT or HM under CHSP

Before approving a recommendation for AT or HM, Assessment Delegates first need to decide if an older person requires and is eligible to access one or both of these service groups.

Existing questions in the function section of the IAT will help to identify and determine an older person's need for assistive technology or home modifications. The purpose of the function section is to understand a client's functional ability, their ability to complete activities of daily living, and if the client requires further assistance with these.

When reviewing the assessment and IAT, Assessment Delegates will need to consider whether the older person's:

- needs and goals that could be met through using assistive technology or home modifications
- can have those needs met through the services under Assistive Technology and Home Modifications

8.5.3. Step 2. Review service recommendations for AT or HM under CHSP

Service recommendations represent referrals that can be made through the Assessor Portal to Commonwealth-subsidised aged care services.

Review the service recommendation details for CHSP Assistive Technology and CHSP Home Modifications including:

- service type and service (sub-type) – if applicable
- start, end and review dates – if applicable
- frequency, intensity
- priority
- outcome.

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8.6. Approving permanent residential care

8.6.1. Step 1. Decide if the older person requires ongoing residential care

Permanent residential care is delivered through the service group residential care and an access approval for the ongoing classification type. It is provided by registered providers in approved residential care homes.

Before approving a recommendation for residential care, Assessment Delegates first need to decide if an older person requires and is eligible to access this service group.

There is one key point to remember when deciding on access for older people who are **not** Aboriginal or Torres Strait Islander. **Section 68** of the Aged Care Act 2024 (the Act) requires these older people to have a continuing need for funded aged care services because of sickness in order to access the residential care service group. Assessment Delegates need to be satisfied, that the person's sickness at the time of assessment means that they have a continuing need for residential care.

8.6.2. Step 2. Confirm the priority category

To meet the requirements of the Act, an older person being approved for permanent residential care will be assigned a priority category (1, 2 or 3). The priority category is not currently being used to prioritise access to residential care.

Table 48. Priority categories for permanent residential care

Category #	Description
1	The person: • has a high urgency rating; or • resides in a rural or remote area classified as MM 5, MM 6 or MMM 7; or • is Aboriginal or Torres Strait Islander, homeless, or is entering residential care due to emergency circumstances.
2	The person does not meet the criteria for Priority Category 1 and has a medium urgency rating.
3	The person does not meet the criteria for Priority Category 1 and has a low urgency rating.

The priority category is automatically generated by the assessor portal based on the individual's circumstances, urgency rating and in accordance with the criteria specified by the Aged Care Rules 2025 (the Rules).

Assessment Delegates need to verify that the urgency rating assigned to the individual accurately reflects their needs and are supported by the evidence provided.

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8.6.3. Urgency rating for residential care

A person's urgency rating is different to their need for residential care.

When selecting Residential Permanent assessors will be required to give a response to ' What is the urgency of this care type'. This question is a mandatory question with a rating to be selected from high, medium or low.

The Rules specify when an urgency rating of low, medium or high will apply to an individual in relation the classification type ongoing for residential care. The table below summarises the criteria for each urgency rating.

Table 49. criteria for urgency ratings for residential care

Urgency rating	Description
High urgency	**This rating applies if:** • The individual has a need for immediate access to ongoing funded aged care services delivered in an approved residential care home which, if not met, may place the individual's safety, health or wellbeing at risk. **Indicators**: Recent falls, hospital admission, unsafe to return home, severe decline. **Example**: A client in hospital post-fall who lives alone and whose needs exceed Home Care supports.
Medium urgency	**This rating applies if:** • The circumstances for a high urgency rating do not apply to the individual; and • When considering the individual's circumstances and preferences, the individual is expected to seek access to permanent residential care within the next 6 months. **Indicators**: Declining function, rising carer stress, complex but not urgent risks. **Example**: A client with moderate incontinence and cognition issues whose carer is overwhelmed.
Low urgency	**This rating applies if**: • The circumstances for a high or medium urgency rating do not apply to the individual.

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Urgency rating	Description
	Indicators: Some decline, minor falls, current supports are working, client prefers to delay move. **Example**: A client managing at home with informal support but thinking about future needs.

Note: The urgency rating reflects how soon an individual needs residential care to avoid significant risk to their health or safety. This is separate from whether they *require residential care* or have *high-level care needs*—it's about the *timing* of that need.

Assessors are expected to select the rating which balances objective consideration of needs with the subjective perspective of the older person and/or appointed decision maker/s. Assessors should include a brief note in the *reason or comments* section explaining key reasons for the rating. See Chapter 6 for more information.

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8.7. Approving residential respite care

8.7.1. Step 1. Decide if the older person requires short-term residential care

Like permanent (ongoing) residential care, residential respite is delivered through the service group residential care. Access to residential respite requires an access approval for the short-term classification type. It is provided by registered providers in approved residential care homes.

Before approving a recommendation for residential care, assessment delegates first need to decide if an older person requires and is eligible to access this service group.

There is one key point to remember when deciding on access for older people who is **not** Aboriginal or Torres Strait Islander. **Section 68** of the Aged Care Act 2024 (the Act) requires these older people to have a continuing need for funded aged care services (including nursing) because of sickness in order to access the residential care service group. This requirement is also applicable to time-limited approvals including residential respite care. As an Assessment Delegate approving an individual for residential respite care assessment, they need to be satisfied that an older person's sickness at the time of the assessment means they have a continuing need for residential care including nursing services for a limited period of time.

Residential respite care is provided on a temporary basis within an approved residential care home. It is intended to give either the individual or their carer a short-term break from ongoing care responsibilities. Residential respite should only be recommended and accessed when there is a genuine short-term requirement for care. It is important to note that residential respite care is not a substitute for aged care rehabilitation or restorative care services.

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Individuals approved for residential respite care are entitled to up to 63 days per financial year, with a possible 21-day extension under the Aged Care Rules 2025. These respite days do not need to be taken all at once and can be used flexibly throughout the year. Note that these timeframes do not apply where services are accessed under a specialist aged care program.

8.7.2. Step 2. Decide the classification level

When recommending an individual for residential respite care, assessors should complete the De Morton Mobility Index ‑ modified (DEMMI-modified) assessment. This tool assesses the individual's mobility and determines their eligibility for one of three respite funding classes: Respite class 1, Respite class 2, Respite class 3, based on the level of mobility observed.

The DEMMI-modified assessment is available within the IAT, but can only be used as part of a Comprehensive Assessment, as it must be completed by a clinically trained assessor that has completed the DEMMI-modified training.

It is a Clinical Assessment Delegate's responsibility to ensure that the DEMMI-modified has been accurately completed.

If the DEMMI-modified assessment cannot be completed at the time of assessment, the individual will be temporarily assigned a default funding class (Class 0). This classification remains in place until a formal Residential Aged Care funding assessment is carried out within the residential aged care home, at which point the appropriate funding class can be determined based on the individual's assessed mobility.

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8.7.3. Extensions for residential respite

Assessment Delegates may receive requests for a 21-day extension to residential respite care – for example, when a carer is unwell or temporarily unable to resume their care responsibilities. There is no limit to the number of extensions that may be granted beyond the standard 63 days of respite care per financial year.

Typically, the residential aged care provider submits the extension request via the My Aged Care Service and Support Portal, and an assessment organisation receives it through the Assessor Portal for an Assessment Delegate's action.

It is the responsibility of the assessment delegate to review the request and either approve or decline it. Once a decision is made, the Assessment Delegate must communicate the outcome to the provider.

An assessment delegate will need to be satisfied that an increase in the number of respite days was necessary due to any of the following:

(a) carer stress

(b) severity of the individual's condition

(c) absence of the individual's carer

(d) any other relevant matter (for example, where a provider delivers an episode of respite care in good faith but subsequently finds out the care recipient's allocation of respite days had already been exhausted).

Please note, there is no right of review if an extension request is declined.

Once decided, you must give written notice to the registered provider of your decision whether to extend within 28 days after the application was made. This written notice must include the day the decision takes effect, which may be before the day the decision is made.

Extensions are granted only at the previously approved level of care. If a higher level is needed, a reassessment and new approval by you (or another Clinical Assessment Delegate) is required before the extension can be granted

Managing residential respite care | Australian Government Department of Health, Disability and Ageing

8.8. Approving transition care

8.8.1. Step 1. Decide if the older person requires transition care

Available following a hospital admission, transition care is delivered under the service groups of home support, assistive technology and residential care.

Transition Care Program (TCP) is designed to support individuals in the period immediately after discharge from hospital. It aims to facilitate recovery, improve functional capacity, and provide time and support in a non-hospital environment while long-term care arrangements are being considered. The 'non-hospital environment' may be a home or community setting, or a residential care home.

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Transition care and the *Aged Care Act 2024*

Before approving a recommendation for transition care, Assessment Delegates first need to decide if an older person requires and is eligible to access to one of the relevant service groups.

Please note section 68 of the Aged Care Act 2024 (the Act) (relating to 'people who are sick') applies to approving Transition Care in the same way it applies to approving residential respite care. Section 67 of the Act (relating to people who have a disability) also applies to approving people for Transition Care in the same way as it applies to approving people for home support (under the Support at Home program or CHSP) and assistive technology (under the AT-HM scheme or CHSP).

To access hospital transition care, an individual must first undergo an aged care needs assessment following a hospital admission. If it is decided they require and are eligible for hospital transition care, under the Act Assessment Delegates must approve them for:

- the classification type hospital transition for all three of the following service groups: home support, assistive technology and residential care

- the service type assistance with transition care under the home support service group
- all service types that can be delivered through the Transition Care Program, as specified in sections 50, 53 and 62 of the Aged Care Rules 2025
- the corresponding classification level for each of the service groups approved: *HS HT class* for home support, *AT HT class* for assistive technology and RC HT class for residential care.

The table below summarises the possible approvals under the Act for hospital transition care. The Notice of Decision template will include all of these approval values and a prompting an assessment delegate to include them.

Table 50. Summary of approvals under the Act for hospital transition care

Service group	Classification type	Classification level
Home Support	**Hospital transition**	HS HT class
Assistive technology	**Hospital transition**	AT HT class
Residential Care	**Hospital transition**	RC HT class

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Access to transition care

Transition care is time-limited, with individuals allocated a funded period of 12 weeks to access services under the program. However, if the individual's recovery requires additional time, the service provider can apply for an extension.

The Transition Care Program is defined under the Aged Care Act 2024 as a specialist aged care program. The number of places available for this care type is determined by the Minister, based on state and territory needs. Only registered providers are permitted to deliver hospital transition care using these allocated places.

Importantly, to be eligible for the program, the individual must be:

- medically stable at the time of assessment; and
- is in the concluding stage of a hospital episode; and
- has the potential to benefit from accessing services delivered through the relevant service group under the TCP; and
- at the time the assessment was carried out, a hospital inpatient.

It is an Assessment Delegate's responsibility to confirm medical stability before approving access to the program.

Once an individual is approved for hospital transition care, it is usual practice for hospital discharge staff to refer them directly to their local Transition Care provider, following delegated approval.

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Accessing residential care/residential respite and transition care

A person in permanent residential care who is receiving Transition Care must take Hospital Transition Leave for the duration of their TCP episode. In addition, they are not eligible to receive services under the Restorative Care Pathway under Support at Home.

An individual receiving Transition Care is unable to access residential respite care while Transition Care is in effect.

Duration of Transition Care

The standard period for a transition care episode is 12 weeks (84 days).

This period may be extended by 6 weeks, so the total transition care episode is 18 weeks (126 days) if the individual makes an application in accordance with the requirements of the Rules and is determined to require access to the services for the additional period.

Transition Care Program Guidelines | Australian Government Department of Health and Aged Care Transition Care Program | Australian Government Department of Health, Disability and Ageing

8.8.2. Step 2. Record the decisions

When recording a decision to approve an individual for transition care, Assessment Delegates will be required to confirm a priority level for the care type. For transition care approvals, assessment delegates must ensure a priority level of 'high' is assigned to all approvals.

8.9. Other approvals and considerations

8.9.1. Alternative entry – giving approval after service commencement

Care, including urgent care, can be approved when assessment wasn't possible prior to accessing those services. Section 71 outlines that an individual can be approved for services even if an assessment was unable to be conducted prior to accessing those services if the individual applies within the specified period under the Aged Care Act 2024 (the Act) and the System Governor is satisfied that certain circumstances applied to the individual. Further information around this is detailed in Chapter 3.

If an Assessment Delegate is satisfied one of the alternative entry circumstances applies to an individual and that the other requirements under section 71 have been met, the Act allows the date of effect of approval to be set to the date care began. The Notice of Decision (approval letter) template includes wording to cover this scenario, to ensure that providers are paid from the beginning of service delivery. Delegates prompted by the system to enter a 'Delegation date' for their approval should always enter the actual day they make the decision, not the day when care began.

In most cases, individuals who have accessed a service prior to an assessment would have accessed this service through the My Aged Care contact centre urgent services pathway.

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Other circumstances may be emergency respite care and services provided by National Aboriginal and Torres Strait Islander Flexible Aged Care Program (NATSIFAC) and Multi-Purpose Services Program (MPSP).

Services delivered before an assessment may not always be visible in the Notice of Decision (approval letter). Assessment Delegates should always check the Support Plan in the Assessor Portal to view these services and be sure that they consider whether or not to approve these services.

Note:

There may be instances where an individual may refuse to have an assessment if the urgent service has finished and they no longer require the service(s).

In this instance, the registered provider can make an application to the Assessment Delegate to approve the individual for the service(s) without an assessment under the exceptional circumstance provision at section 65(4) of the Act (see *Exceptional circumstances – approving a service without an assessment* later in this chapter).

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Application process for people who have received aged care services and have not yet applied for an assessment under My Aged Care

NATSIFCAP and MPSP

Alternative entry pathways are available for individuals who commenced accessing specialist aged care services such as NATSIFACP and MPSP before an approval was given and at the time they were seeking access to services there was a significant delay in the availability of an approved needs assessor to conduct an assessment.

An application can be lodged for access to Commonwealth subsidised services under the Act's alternative entry provisions via any of the available application pathways (e.g. Contact Centre, online referral or self-referral through an Assessment Organisation). The service provider may help the client with completing/submitting the application. Unless an extension is granted by the System Governor, applications must be lodged within 30 days after the first day of care commencing. The application should include the date the individual began receiving care, ensuring appropriate alternate access dates are approved.

Residential care or residential respite care

Alternative entry pathways are available for individuals who require urgent residential care or residential respite care. To be eligible, at the time they accessed this care, there must have been a significant risk of harm to the individual if those services were not delivered before approval to access funded aged care services was given.

An application can be lodged for access to residential care or residential respite care under the Act's alternative entry provisions via any of the available application pathways (e.g. Contact Centre, online referral or self-referral through an Assessment Organisation) or by submitting the *Emergency Residential Care - Application for Care* form (see below). The service provider may help the client with completing/submitting the application. Unless an extension is granted by the System Governor, applications must be lodged within 5 days after the first day of care commencing. The application should include the date the individual began receiving care, ensuring appropriate alternate access dates are approved.

If completing the *Emergency Residential Care - Application for Care* form, the form **must:**

- have both the **Emergency application section** and the **provider details section** of the form completed; and
- The provider may submit the form, including supporting information for referral to their local assessment organisation, **within 5 days** after the day care commenced unless an extension has been granted by the System Governor (on application).

If an older person and/or their active, active, appointed decision maker authorised under section 28(2) of the Act is unavailable, the registered provider may sign the form.

In urgent cases, the person is already receiving care, but this does not mean they are permanently entering aged care or will remain at the current facility.

If a provider prefers the older person's appointed decision maker to sign the form, they may apply for an extension. Under **section 71** of the Act, an extension must be requested if the application cannot be submitted within the required timeframe.

Intake and assessment process for an Emergency Residential Care – Application for Care

When the form is received, the assessment organisation must:

- Ensure the form is signed by the older person, or their active, appointed decision maker, and confirm the *emergency case* section is completed correctly by the registered provider.
- Confirm the date the form was received. If it was submitted **after 5 calendar days** from the care start date, assessment can only proceed if the provider has been granted an extension by the System Governor, following an application for extension.
- Register and self-refer the older person in the My Aged Care assessor portal (if required and self-referral criteria are met).
- Assign intake priority. Although the person is already in care, the **Triage Delegate** must consider the urgency of the individual's circumstances. If the persons condition is rapidly deteriorating, the assessment should be scheduled as soon as possible.
- Upload the verified form to the older person's record.
- Schedule a comprehensive assessment with an assessor. Where possible, this should be face-to-face and collect information to:
  - Determine the older person's required level of care; and
  - Confirm that urgent circumstances existed at entry and that prior approval was not practicable.
- Record the Emergency Care start date (for residential care or residential respite) before sending to the Assessment Delegate.
- The assessor must collect as much information as possible about the urgent situation from the older person, their registered supporters (if available, and in line with the older person's will and preferences), their active, appointed decision maker/s (as relevant), the registered provider, and any other professionals involved at the time of entry.

Making a decision about alternative entry

Assessment Delegates are responsible for determining whether an older person who commenced care before applying for approval can be approved under alternative entry. To do this, they must ensure that the application process meets all relevant requirements described in this content, including, that the older person is eligible for the type of care being

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provided, and that the care was urgently needed at the time it began. Assessment delegates must also be satisfied that it was not practicable to obtain approval before the care commenced (see circumstances described above). The decision must be based primarily on the care needs of the older person at the time they entered care.

If care is approved under urgent circumstances, an assessor will need to update the My Aged Care assessor portal. This includes checking the *Emergency Care* flag and recording the date the older person entered care. Doing so ensures the registered provider receives the appropriate Commonwealth subsidy from the correct start date. An assessor will also send the referral to the provider via the portal, allowing them to access the older person's record and view all relevant approval details.

Assessment delegates should also be aware that this process applies in cases where the assessment has been completed but the older person passes away before a decision is made.

Not all circumstances qualify as urgent. Situations such as a bed becoming available in a residential aged care facility, or a transfer from an acute care setting to another care environment, do not meet the criteria for urgent admission. If an assessment delegate determines that the older person did not urgently require care at the time of entry, but they are otherwise eligible, the application can still be approved, however the date of effect will be the date you make the decision.

The decision about whether to approve alternative entry dates for an older person is a **reviewable decision** under section 557 of the *Aged Care Act 2024.*

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Extensions

While it is best practice for providers to submit the *Emergency Residential Care - Application for Care* form−complete with the emergency case section−within the required timeframes of the older person entering care, the Aged Care Act 2024 allows an application for an **extension of time** under **section 71** if this is not possible.

If the form is not signed and submitted within the required five-day timeframe, it is considered incomplete. In this case, the registered provider must first apply to the System Governor for an extension The delegation for granting extensions for those seeking access to funded aged care services through alternative entry will sit outside Assessment Organisations.

In considering an extension the System Governor will either decide to:

- Approve the application and determine a longer period for the individual, or
- Reject the application

As soon as practicable after a decision has been made, the System Governor must provide notice of their decision. Included in the notice will be the reasons for the decision and how to apply for a reconsideration of the decision.

Where the older person has not made their application in the required timeframe, an extension may be granted by the department. In these instances, please email a request for an extension to AssessorSupport@health.gov.au. Please include a brief explanation on the reason for the extension.

If an assessor believes the older person urgently needed care but the approval is already recorded in My Aged Care with a later date, they must initiate the **corrections process** to

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backdate the approval. If the required backdating exceeds **42 days**, a correction cannot be made, and a reassessment is required.

8.9.2. Exceptional circumstances – approving a service without an assessment

An Assessment Delegate has the authority to approve access to funded aged care services without the individual undergoing a formal aged care needs assessment.

This is permissible if the Assessment Delegate is satisfied that there are exceptional circumstances justifying the decision. This will typically occur for a cohort that access funded aged care services through the alternative entry pathway but may pass away prior to receiving an assessment or refuse an assessment (particularly if they are receiving a time-limited service). An individual or a registered provider on their behalf must have submitted an application using the approved form, and no disqualifying conditions outlined by the rules should apply.

In a case where the older person has passed away, assessors should follow the *Client Deceased Before Assessment* process available through the My Aged Care assessor portal. This ensures the approval is properly recorded in the system and automatically submitted to **Services Australia**.

If there are complications preventing the use of the online process, an assessor should consult their Team Leader for advice.

Important:

Do not cancel the assessment in My Aged Care using the reason ‘client deceased’. This action changes the older person’s status to ‘deceased’ and locks the record as read-only, preventing an assessment delegate from recording an assessment decision.

If the record has already been locked, the assessor must contact the My Aged Care Service Provider and Assessor Helpline (1800 836 799) to temporarily reactivate the record so the assessment outcome can be recorded. Once the decision is entered, the status must then be changed back to ‘deceased’ to reflect the older person’s passing.

Assessment organisations may also seek advice from the department, especially in cases where a person who has received funded aged care services but is refusing an assessment or where a significant delay between entry and application means the older person’s current needs no longer reflect their original circumstances–making a valid assessment difficult.

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9. Chapter 9: Finalising the assessment and service referral

What you'll find in this chapter

This chapter includes guidance about:

- finalising the assessment
- recording and communicating the assessment outcome
- referring the older person for services, and supporting them to access services
- the single provider model for Support at Home (which includes a single referral code for all services/pathways)
- completing the Notice of Decision (approval/non-approval letter).

All sections in this chapter are new content

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9.1. Overview of assessment finalisation

An assessment is finalised when:

- the Assessment and Support Plan are completed; and
- all required decisions have been made and recorded by the Assessment Delegate; and
- when effective referrals have been made or the older person has decided not to proceed with accessing aged care services, and
- the older person (and their registered supporter/s and/or appointed decision maker/s, if applicable) has been notified of the assessment outcome.

An effective referral is where:

- a referral is accepted by a service provider who can deliver a service response consistent with the relevant service recommendations on the older person's Support Plan, **or**
- the older person has accepted responsibility for managing their own referral(s) through a referral code, **or**
- the outcome of the assessment is that no further action is required by the assessor; **or**
- the assessor has made all available and reasonable efforts to connect the older person with a service provider appropriate to their assessed care needs.

When the Support Plan is finalised and effective referral has been made, the assessor should inform the older person to contact their provider or the My Aged Care contact centre if there is a future change in needs, goals, or preferences. If within their remit, the My Aged Care contact centre will assist the older person with their enquiry. This could include re-issuing a referral code or if a referral is rejected, sending a referral to another provider. The

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contact centre or the provider can send a Support Plan Review request to the assessment organisation if it is an appropriate request.

Where appropriate, assessors are encouraged to follow up vulnerable or at-risk older people post-assessment who:

- have referrals that have been rejected/not actioned - this may include the monitoring of referrals to services or negotiating with service providers for the provision of alternative services if necessary,
- are working on short-term reablement goal(s) – in line with the length of time stipulated in the Support Plan, and/or
- are vulnerable older people, as determined by complexity indicators or need for linking support and required short-term linking assistance purpose of implementing the Support Plan.

After finalising the assessment, where the department becomes aware that an older person is having difficulty with accessing services, an assessment organisation may be required to follow up with the older person or service provider and provide advice on any follow-up action/s taken.

9.2. Setting the access approval date of effect ('delegation date')

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For an older person's application, the access approval date of effect that Assessment Delegates decide applies to all of the following decisions under section 65 of the Aged Care Act 2024 (the Act):

- the service groups, and the classification types for those service groups
- the service types (and services if applicable).

Unless the older person is being approved for CHSP only via a Home Support Assessment, Assessment Delegates record this date in the Assessor Portal after giving responses to all of the care recommendations. In the 'Save decision and delegate' popup, the Delegate should enter the day that they are making the decision (that is, that day's date) and click 'Save decision'. Note that even if the older person has received services before assessment (using the alternative entry provisions under Section 71 of the Act), the Assessment Delegate should still enter the date the decision is made - not an earlier date.

There is wording in the Notice of Decision (approval letter) relating to alternative entry scenarios and the access approval date of effect.

For emergency residential care or residential respite, the assessor is required to record the date care began through the "Emergency Care Start Date" flag in the Integrated Assessment Tool. This date will allow the service provider to claim for the days prior to the delegation start date. The Assessment Delegate should check this to ensure that the correct date is recorded in this field before proceeding with their decision.

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9.3. Recording and communicating the assessment outcome

A critical record of the assessment outcome is the Notice of Decision (sometimes referred to as the 'assessment outcome letter' or 'approval/non-approval letter').

The older person (and registered supporter/s and/or appointed decision maker/s, if applicable) should be sent the following documents in hard copy via post:

- the Notice of Decision,
- the finalised Support Plan,
- the referral code letter (at a minimum for older people who have been approved for CHSP services),
- any relevant aged care consumer information not provided at the time of the assessment,
- the older person satisfaction survey of the organisation's performance requirements,
- other associated notification documents.

The assessor must:

- call the client once the Notice of Decision is finalised to notify them that their assessment has been completed,
- advise the older person that their Support Plan and Notice of Decision can be accessed via their My Aged Care Online Account (under 'documents' and 'plans' for the Support Plan) and their My Health Record (if the older person has consented),
- advise the client that if they have provided consent, their registered supporter/s are able to access these documents (via their own separate login information) to the client portal,
- advise the initial referral source of the assessment outcome and referral outcome - if requested by the referrer and with the consent of the older person.

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While it is considered good practice to offer an older person a hard copy of their Support Plan and relevant information, where this is not feasible for an assessment organisation, the minimum requirement is that the older person, and where relevant, registered supporter:

- is clear on what is in their finalised Support Plan and are agreeable to this and which Associate People it will be shared with,
- agrees to be provided a soft copy of the finalised Support Plan and if appropriate the referral code letter (noting that older people will receive a letter once they have been assigned a package), and/or
- is aware of how to obtain a copy of the Support Plan and relevant information via their My Aged Care Online Account.

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9.3.1. Notice of Decision of assessment outcome

Assessment Delegates have an obligation under the Aged Care Act 2024 (the Act) to issue a Notice of Decision to the individual within 14 days of making a decision. This notice must be issued after a first assessment, reassessment or Support Plan Review (SPR) and must clearly communicate:

- the outcome of the individual's assessment or reassessment/SPR, including decisions to approve or not to approve access to services,
- other decisions required under the Act, and
- the reasons for a delegate's decision and any other matters required under the Act.

For Assessment Delegates to meet their obligations under the Act, they must ensure that the notice sent to the individual satisfies the requirements in the following sections of the Act:

- **Section 70:** notify the individual about the decision regarding their access approval, including information on the approved service group(s), and the classification type(s) for the service group(s), any service types, and funded aged care services, and the date the access approval takes effect. The reasoning behind the decision and how the older person can apply for reconsideration if necessary must also be clearly explained. The section Reasons for Decision section gives more information on what must be considered and included in the reasons.

- **Section 79**: inform the individual about the classification decision, including the classification level for the approved service group(s), and when the classification level(s) did or will come into effect, and how they can apply for reconsideration if necessary.

- **Section 88:** If necessary, notify the individual about any priority category assigned to a classification type for a service group, clearly explaining the reasoning behind the decision and how they can apply for reconsideration if necessary. This is necessary to include it is decided that an individual should be approved for the following classification types for a service group:
    - ongoing for home support; or
    - ongoing or short-term for assistive technology; or
    - short-term for home modifications; or
    - ongoing for residential care

- **Section 92(4):** If necessary, inform the individual of any place they have been allocated, and the day the allocation of the place takes effect.

Note:
Decisions regarding a second unit of funding for the Restorative Care Pathway will require a separate letter to be generated.

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There are two templates for the Notice of Decision:

- **Approval letter**: Used when the Assessment Delegate is approving access to any services – even if some of the services recommended have not been approved.

- **Non-approval letter**: Used when the Assessment Delegate is **not** approving the older person for access to **any** services at first assessment or reassessment/Support Plan Review (SPR).

Unless the approval is for CHSP only, these templates can be generated in the My Aged Care Assessor Portal after decisions have been made and recorded. Much of the critical information is pre-populated and the templates include detailed guidance on how to complete a legally compliant letter.

Note:

For CHSP-only approvals, a separate 'offline' template that can be downloaded from the My Aged Care Assessor Portal must be used (see later in this chapter for more information).

To ensure the letter is tailored to the individual and includes all required legal information, Assessment Delegates will need to generate it (or download it for CHSP-only approvals) from the My Aged Care Assessor Portal, save it to their desktop, and make the necessary changes following the guidance text in the document.

As part of this, an Assessment Delegate must give reasons for their decisions in the Notice of Decision – further guidance on this is provided in the following sections.

When preparing the Notice of Decision letter, it is essential to include the Commonwealth Coat of Arms as a symbol of the Commonwealth government, along with the My Aged Care logo. Co-branding on letterheads is not permitted, and logos of individual assessment organisations must not be included, as specified in the contractual agreements between the Department and individual assessment organisations.

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Reasons for decisions

Assessment Delegates must consider and record reasons for approval and non-approval decisions relating to service groups, service types or services. Assessment Delegates must turn their mind to these reasons when making approval decisions and then record them in the Notice of Decision.

Delegate decision reasons must:

- demonstrate how the individual meets or does not meet the criteria for approval under the relevant sections 65–68 of the Aged Care Act 2024 (the Act),
- be tailored to the person's specific circumstances, drawing on the information provided in the IAT and support plan,
- clearly explain (for approvals) how the individual satisfies the relevant eligibility criteria under the Act and the rules, with reference to their unique situation.

The Notice of Decision templates provide detailed guidance on how to record reasons that fulfil these requirements. Chapter 8 provides a comprehensive explanation of the eligibility requirements set out under sections 65-68 of the Act and the relevant rules.

Reasons for decisions: approvals

When making a decision, Assessment Delegates must consider the older person's circumstances overall and what service types and services they need, and for what reason. This should already be evident from the information recorded in the IAT or the Support Plan, which detail what the person's needs are, and why the person needs support and what help they need.

Reasons for approval decisions are recorded in the version of the Notice of Decision known as the 'approval letter'.

There are three reasons sections to choose from based on which section of the Aged Care Act 2024 (the Act) applies, the individual's circumstances and their approvals as follows:

Table 51. Summary of approval reasons sections of the Act and applicable circumstances of individuals

Section of the Act	Approval reasons section	Applies when:
Section 66	Section A *(Section B and C not required if this is chosen)*	• the older person is Aboriginal or Torres Strait Islander
Section 67	Section B *(most complex to complete – more info below)*	• the older person is **not** Aboriginal or Torres Strait Islander, **and** • the older person has been approved for the **home support**, **assistive technology** or **home modifications** service groups.
Section 68	Section C	• the older person is **not** Aboriginal or Torres Strait Islander, **and** • the older person has been approved for the **residential care** service group.

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Section B of the Reasons for decisions – approvals section of the Notice of Decision is the most complex for the Assessment Delegate to complete. It includes a list of pre-defined reasons why an older person may need access to service types/services in the home support, assistive technology or home modifications service groups. The Assessment Delegate must choose the reasons that underpinned their decision to give access to these service types/services.

For further guidance, see *Specific reason/s why access is needed under Section 67* in section 7.6.3Chapter 7, which includes a mapping of service types/services to potential applicable reasons.

Reasons for decisions: non-approval

If one or more approvals were recommended by the assessor and/or requested by the older person but were **not** approved, the Assessment Delegate must provide reasons why they did not to approve access to the service group, service type or service. Relevant situations are summarised in the following table.

Table 52. Summary of situations relevant to non-approval of recommend and/or requested approvals

Situation	Applicable Notice of Decision template
A first assessment or reassessment/Support Plan Review where some of the services recommended or requested have not been approved (while others have been approved).	**Approval Letter**
A first assessment where the older person has been found ineligible to access to any services. A reassessment/Support Plan Review where no **additional** services have been approved.	**Non-Approval Letter**

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For non-approval reasons the Assessment Delegate must:

- Consider how the individual's circumstances relate to the all the relevant eligibiltiy criteria set out in the Aged Care Act 2024 and the Aged Care Rules 2025 for the particular service.

For the older person to be considered eligible for a particular service group, service type etc, the Assessment Delegate must be satisfied that **all** of the relevant eligibilty criteria apply. If they do not meet all of the criteria – they cannot be approved.

- Use the free text sections to provide a brief summary of the reasons why the older person does not meet the eligibility criteria.

The Assessment Delegate must refer to the individual's unique circumstances and information in the assessment report (support plan). The Assessment Delegate must include details of how the individual's circumstances related to the eligibility criteria and therefore informed the decision not to approve.

The Notice of Decision templates prompt the delegate when free text description is required. They also include example text to demonstrate the level of detail Assessment Delegates must provide when completing the free-text section for non-approval reasons.

The letter templates account for the scenarios that are most likely to occur in practice. If the Assessment Delegate encounters a scenario that is not covered in the template, their Operational Manager can contact the department at myagedcare.assessment@health.gov.au for further guidance.

Assessment Delegates and Notices of Decision for CHSP

As part of the phased digital delivery process, both Clinical and Non-clinical Assessment Delegates will be required to produce the Notice of Decision 'off-line' (without system automation) for CHSP only approvals, but only Non-clinical Assessment Delegates will be required to produce non-approvals. The system automation that Clinical Delegates will be familiar with when producing a Notice of Decision for all other services except CHSP will not be introduced for CHSP only approvals until a later time.

Instead, Clinical and Non-clinical Assessment Delegates will use a template to complete this process. The Notice of Decision template is available under the 'Forms' tab in 'Reports and documents' tile of the Assessor Portal. To support this change, the department has issued a standalone fact sheet and video guidance on populating the letter itself..

The information Clinical and Non-clinical Assessment Delegates need to include in the letter will be clearly marked, and all required details will be available in the Assessor Portal. While the information for entry-level services like CHSP is less complex than that of Support at Home, it is still important that Clinical and Non-clinical Assessment Delegates review and transcribe the information carefully. Clinical and Non-clinical Assessment Delegates will need to provide reasons for their decisions within the Notice of Decision for CHSP, as they do for all services.

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Uploading and sending the Notice of Decision

Once the Notice of Decision letter is finalised and signed, Assessment Delegates must upload it to the assessor portal (all documents must be uploaded in PDF format) for record-keeping purposes, and then post or email it to the individual (and their registered supporter/s and/or appointed decision maker/s, if applicable) using their preferred communication method/s.

Important:

The Support Plan needs to be included as an attachment whenever the Notice of Decision is sent. The Support Plan lists any approved service types and services, so it is legally considered part of the Notice of Decision.

The Referral Code letter also needs to be attached whenever approvals for CHSP services are given.

Providers can view the Notice of Decision and support plan via the My Aged Care Service and Support Portal.

Older people can also view their Notice of Decision, Support Plan and Referral Code letter (for CHSP approvals) via their My Aged Care Online Account. An older person's registered supporter/s (if any) may also be authorised to access this information.

In rare instances where the Assessment Delegate determines that no funded aged care services are required, the delegate will also need to send a Notice of Decision to the client to formally advise them of this outcome.

Note:
Older people who request/are recommended for the End-of-Life Pathway but are not approved *do not* receive a 'Non-approval letter'.

9.3.2. Notice of outcome of application for second concurrent unit of restorative care funding

If a Support Plan Review is being conducted and a second concurrent unit of restorative care funding has been requested, a letter must be sent to the older person (and their registered supporter/s and/or appointed decision maker/s, if applicable) notifying them of the outcome of the application for the additional funding.

The decision to approve additional funding to the Restorative Care Pathway episode is made under section 195-3 of the Aged Care Rules 2025.

The appropriate template can be found under the 'Forms' tab in 'Reports and Documents' tile in the Assessor Portal. This is a different template to the Notice of Decision issued after an assessment. Do not use the Notice of Decision you would usually use to communicate assessment outcomes.

Once finalised, the letter must be signed and uploaded to the assessor portal for record-keeping purposes, and then post or email it to the individual (and their registered supporter/s and/or appointed decision maker/s, if applicable) using their preferred communication method/s.

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9.3.3. Registered supporters who are authorised to receive copies of letters

If an older person has a registered supporter/s who is authorised to automatically receive certain information or documents about an older person, they must be given a copy of the information or document. Registered supporters can access these documents if they have arranged their own login to the client portal via My Aged Care. If an older person has multiple registered supporters who are all authorised to receive copies of an information or document, each registered supporter must receive a copy. This includes a Notice of Decision.

Section 29 of the Aged Care Act 2024 (the Act) provides that any information or document that is required or authorised under, or for the purposes of, the Act to be given to an older person must also be given to their registered supporters if:

- the older person has consented to sharing this kind of information with their registered supporter, or
- regardless of whether the older person has consented, the registered supporter is a person covered by subsection 28(2) of the Act. That is, they are a registered supporter who is also an active appointed decision-maker for the older person.

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These registered supporters are called ‘supporters’ and ‘supporter guardians’ in the assessor portal and app.

A registered supporter who is recorded as a ‘supporter lite’ cannot automatically be given information or documents about an older person. This is because the older person has not consented to that registered supporter receiving their information and documents under section 29 or the registered supporter is not a person covered by subsection 28(2) of the Act. That is, they are not a registered supporter who is also an active appointed decision-maker for the older person.

For example, assessors must not send a supporter lite a Notice of Decision. If a request has been made by a supporter lite to access a Notice of Decision letter, this should be escalated to the departmental team responsible for supporters.

9.3.4. Using electronic signatures

Under Section 10 of the Electronic Transactions Act 1999, electronic signatures can be used when a Commonwealth law requires a person’s signature. Assessment Delegates can use an electronic signature instead of a handwritten one.

However, before using an electronic signature, Assessment Delegates need to make sure that all legal requirements have been met under Section 10 of the Electronic Transactions Act 1999.

To do this effectively, follow these practices:

1. **Monitoring Use:** Set up procedures to track when their electronic signature is applied, so Assessment Delegates are always aware of its use.

2. **Administrative Assistance:** Assessment Delegates can get help from administrative staff to attach their electronic signature, but they should remember that the final responsibility for the notification remains with the Assessment Delegate. Administrative staff do not have the authority to apply the signature on their own.

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Electronic Transactions Act 1999

9.4. Referral and support for service access

9.4.1. Referral codes

A referral code is a unique reference number used to connect an older person with a provider, enabling them to begin receiving services. Referral codes will be generated at different stages and through different mechanisms depending on the program recommended during the aged care needs assessment.

9.4.2. When to share referral codes

From 1 November 2025, all Australian government-funded aged care services fall under the *Aged Care Act 2024*. This includes CHSP services, which were not under the *Aged Care Act*

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1997. This means that for all service approvals (including for CHSP), referral codes cannot be issued to the older person or service providers until the Assessment Delegate has completed and signed a Notice of Decision.

This is an important change that assessment organisations must adhere to, to ensure compliance with the *Aged Care Act 2024*. If referral codes are given to the older person and/or provider(s) and a Notice of Decision is ultimately *not* issued, this risks invalidating the assessment outcome. The Notice of Decision is the key legal mechanism that records a decision by the System Governor for the client to receive a funded aged care service.

The Notice of Decision does **not** include the referral code(s) for the recommended service(s). Referral codes displayed in the Support Plan can be used to reach out to as many service providers as preferred. The Support Plan must be sent as an attachment to the Notice of Decision. For CHSP service referrals, the referral code letter must also be sent as an attachment to the Notice of Decision.

9.4.3. Generating referrals/recommendations

An assessor must ensure that older people are referred to service providers according to service availability and the older person's needs and preferences.

Assessors may send referrals electronically to one or more government-funded service providers of the older person's choice or provide the older person with a referral code for the older person to self-manage the referral. The client can also ask for the code to be broadcast to several local providers to find availability.

Prior to sending the referral, the assessor must ensure that the older person (or their appointed decision maker, regardless of whether they are a registered supporter):

- consents to the My Aged Care referral method (broadcast, preference, or referral code)
- consents to the department providing information from the older person's My Aged Care online account to the provider for the purposes of the provider actioning the referral (including to provide the agreed service recommendation on the Support Plan.

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9.4.4. Support at Home referrals

A single provider will oversee and deliver all Support at Home services (including ongoing services, short-term services through the Restorative Care Pathway, End-of-Life Pathway and AT-HM scheme) for a participant as able.

Under this model, registered providers will be required to hold registration that covers all services the participant will receive.

Note some providers may not be able to deliver all services a participant needs. Providers can choose to engage a third-party (associated provider) to deliver services on their behalf, however the provider remains responsible for delivery of services and compliance with relevant obligations.

If an older person prefers a particular service provider who does not have availability, the older person can elect to be referred to that service provider's waitlist on the system (if a waitlist is available). Older people can be on multiple waitlists at any one time.

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A participant can change Support at Home providers at any time. Once a participant has chosen their provider, the provider will receive a referral in the My Aged Care Service and Support Portal.

Where a service provider is not available to meet the needs of the older person and the older person does not want to be put on a waitlist, the assessor should have a further conversation with the older person to consider other alternative options for support. Other options may include:

- a different service provider that could meet the need (on an interim or ongoing basis)
- non-Commonwealth-funded services; or
- the older person and/or their carer, registered supporter or other person who supports the older person being able to address their need.

Where required, the assessor is to provide short-term assistance to the older person for the purpose of implementing the Support Plan. This may include monitoring referrals or discussing options with service providers for the provision of alternative services if necessary, or in cases of providing for vulnerable older people, linking support or care coordination.

Referrals for Restorative Care Pathway, the AT-HM scheme and End-of-Life Pathway

If a participant receiving ongoing Support at Home services is referred to a short-term pathway (Restorative Care, the AT-HM scheme and End-of-Life), and their current registered provider does not deliver services under these pathways, the participant will be required to change providers to access their short-term pathway.

Assessors should ensure the individual is aware of this and confirm referral needs with the individual.

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For further information see the Support at Home Program Manual.

Support at Home referral codes

The same referral code will be issued for every Support at Home (SaH) classification level (this includes ongoing and short-term services). This referral code will apply to all services approved under that classification level. The older person can present the referral code directly to their preferred provider or alternatively they can request assistance from the contact centre or the assessor for assistance in issuing a referral to a provider(s).

Referral codes are not listed in the Notice of Decision letter. Referral codes are generated and listed in the support plan in circumstances where a referral code is needed.

For an individual approved for an ongoing SaH classification or AT-HM, the referral code is generated once the individual has been allocated a place (and therefore funding) through the Support at Home, Assistive Technology or Home Modifications Priority Systems.

In circumstances where a participant is already receiving services from a SaH provider (for example, moving from the End-of-Life Pathway back to ongoing services), a referral code is not generated. In these circumstances a referral code is not required as the connection with a provider and access to the participant's record is already established through the initial use of the referral code.

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For new Support at Home participants approved for the End-of-Life Pathway or Restorative Care Pathway:

- if a service referral has been made, the provider will contact the participant
- if no service referral has been made, the referral code will be displayed in the support plan.

If a participant is already receiving services and wants to change providers, they will need to contact the My Aged Care Contact Centre to reactivate their referral code, enabling it to be used as a way to connect with a new provider. Alternatively, if the participant indicates during their assessment that they want to change providers and have the assessor make the service referral, the referral code can be found in the assessor portal.

9.4.5. CHSP referrals

Assessors should not issue CHSP referral codes until *after* the assessment delegate has approved the recommendation. An exception to this is the alternative entry pathway.

For CHSP services, a Support Plan may contain recommendations for multiple services within the same service type (e.g. Laundry, General House Cleaning and Shopping assistance services under the Domestic Assistance service type). The assessor will generate a separate referral code for each service type recommended.

If a service aligns with the older person's assessed needs and goals, assessors can issue more than one referral code for the same service type – allowing the person to access two services (sub-types) from two different providers, provided there is no duplication of service.

- For example, if an older person wishes to access services under the Social Support service type from two different providers (e.g. individual social support and group social support), the assessor should create two separate service recommendations using the 'Add a service recommendation' function. Each recommendation will generate a distinct referral code, ensuring that each provider receives a unique referral code
- For Allied Health and Therapy and Therapeutic Services for independent living service types, the assessor should always generate a separate referral code for each service recommended (e.g. separate referral codes for Physiotherapy and Occupational Therapy) as outlined above.

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9.4.6. Residential care referrals

For residential (including through Multi-Purpose Service Program (MPSP)), the assessor can issue a referral code following the assessment and approval of services to enable the older person to take time to look for a suitable residential facility. Referral codes are contained within the client's support plan.

When selecting a residential aged care service provider to issue a referral to, assessors can use Star Ratings to help compare the quality of aged care facilities (not applicable for MSPS and National Aboriginal and Torres Strait Islander Flexible Aged Care Program (NATSIFAC)). Star Ratings are available via the 'Find a provider' tool on the My Aged Care website. All aged care facilities receive an overall Star Rating and ratings against Compliance, Residents' Experience, Staffing and Quality Measures).

Assessors can share a client's referral code with as many providers as the client chooses. A provider will use the referral code to view the client's approved services and specific

needs in the service and support portal. If the provider and client agree they will take a bed in the residential care home, a formal agreement will be exchanged between the parties, and the referral will be formally accepted in the My Aged Care portal. Once a provider accepts a referral and payments commence from Services Australia, all other open referrals will close.

My Aged Care - 'Find a provider' tool

9.4.7. Generation of referral codes for different programs and pathways

The table below provides further details regarding referral codes across the different approval pathways and programs.

Table 53. Guide for generation of referral codes for aged care programs

Aged care program	Pathways	Generation of a referral code
Support at Home program	SaH ongoing	Once the older person is allocated a place through the Support at Home Priority System, they will be sent a funding assignment letter containing their recommended services and the referral code for ongoing SaH services classifications 1 - 8. If a participant is reassessed to a higher ongoing classification the upgrade notice letter will contain a referral code. However, the participant does not need to take any action as the referral code will already be active with their provider. To change providers, they will need to contact the My Aged Care Contact Centre to reactivate their referral code which can then be used to connect with a new provider. This follows the same pathway previously used in the Home Care Packages Program. Note: If the older person has previously been approved for the End-of-Life Pathway, a referral code is not generated
Support at Home	End of Life Pathway (EoL)	Referral code is generated into the Support Plan attachment provided to clients (if no service referral has been made AND the older person has not been approved for an ongoing Support at Home classification previously)

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Aged care program	Pathways	Generation of a referral code
Support at Home	Restorative Care Pathway (RCP)	Referral code is generated into the Support Plan attachment provided to clients (if no service referral has been made and the older person has not been approved for an ongoing Support at Home classification previously). **Note:** If the current provider does not provide Restorative Care the older person will need to change providers. To change providers, they will need to contact the My Aged Care Contact Centre to reactivate their referral code which can then be used to connect with a new provider.
Support at Home	Assistive Technology -Home Modifications (AT-HM) scheme	Once the older person is allocated a place through the Assistive Technology and/or Home Modifications priority system, they will be sent a funding assignment letter containing their recommended services and the referral code for their AT and/or HM classifications. This is the same referral code used for SaH ongoing, EoL and RCP classifications. If the participant is already receiving services from a Support at Home provider, they do not need to take any action as the referral code will already be active with their provider. Note: For the below circumstances, where AT-HM funding is allocated immediately, the participant does not receive a funding assignment letter.1. AT and HM short-term with RCP 2. AT short-term with EoL 3. AT ongoing, AT and HM short-term for participants who have been previously assigned the EoL pathway. 4. Approval for a higher AT or HM short-term tier through an SPR. If the participant is not already receiving services from a Support at Home provider, the referral code is generated into the Support Plan attachment.

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Aged care program	Pathways	Generation of a referral code
Commonwealth Home Support Program (CHSP) National Aboriginal and Torres Strait Islander Flexible Aged Care Program (NATSIFACP) Multi-Purpose Service Program (MPSP)		CHSP, NATSIFACP and MPSP services will require assessment, delegate approval, and a Notice of Decision (letter outlining their decision) to be issued. The Support plan attachment provided to clients will include the referral code(s) for CHSP. MPSP and NATSIFAC (if no service referral has yet been made). For CHSP services, a Support Plan may contain recommendations for multiple services within the same service type (e.g. Laundry services, Shopping assistance and General house cleaning under the CHSP Domestic Assistance service type) **Note:** For Allied health and Therapeutic services for independent living Service types, referral codes should be generated and display at the service level in the Support Plan. For any CHSP referrals, these codes will also be contained in a separate Referral Code Letter which is sent to the older person for ease of access. **Note:** if older person consents to electronic notifications, the Assessment Delegate can send these letters via email.
Transition Care Program (TCP)		The hospital discharge staff will identify and liaise with a TCP provider to access these services using the referral code.
Residential Care		For residential (including through MPSP), the assessor can issue a referral code following the assessment and approval of services to enable the older person to take time to look for a suitable residential facility. Referral codes for residential care will be contained within the Support Plan attachment.

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9.4.8. Steps an assessor must take

An assessor must:

- Check availability of service providers in the older person's region. Commonwealth funded service provider contact details can be accessed in the My Aged Care Service Finder. Service providers will find the name of an older person's assessing outlet in the 'Plans' tab of the older person's record.
- If required (e.g. for vulnerable older people) contact providers on behalf of the older person when referring.

- Add additional documentation in the 'Notes' to ensure all pertinent information is available to service providers.

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- Consider all referral options (through portal by broadcast, preference, direct referral, or issue referral code) and the service priority (excluding support at home).
- Consider referrals/recommendations to services not listed in My Aged Care.
- Where service availability is limited, work with the older person to explore alternative options of support to meet their areas of concern and goals.
- Discuss and record carer information and advise older people and/or their carers of carer support options available including requesting a call back from a local Carer Gateway service provider or the National Dementia Helpline.

Assessors must ensure they are aware of appropriate care options within and outside Commonwealth funded aged care, such as local supports, health, community services and private services. To offer a broad range of strategies to assist the older person to achieve their goal, the assessor builds and maintains effective working relationships with service providers and extends connections with services and organisations in their local community, including those not listed in My Aged Care.

9.5. Corrections process

Assessment Delegates are responsible for ensuring that all recorded decisions are accurate and complete. Diligent quality checks are essential to minimise the need for corrections and maintain accurate records.

Despite thorough quality checks, errors may occasionally occur. If an assessment delegate identifies an administrative or typographical error after submitting a decision, it is essential to initiate the correction process promptly.

When an error is identified, assessment delegates must submit a correction request within 42 days of the original decision. The correction request will be forwarded to the department for consideration.

See Chapter 11 for more information about the corrections process

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10. Chapter 10: Support Plan Reviews and reassessments

What you'll find in this chapter:

This chapter provides guidance around the circumstances for conducting a Support Plan Review (SPR) or a reassessment for each aged care program.

The majority of this chapter includes new information

10.1. Reassessments under the *Aged Care Act 2024*

Section 64 of the *Aged Care Act 2024 (the Act)* provides for aged care needs reassessments. A reassessment may be required when an individual's circumstances have changed.

In the Act the term 'reassessment' is used as an umbrella term to describe both SPRs and reassessments. An individual may request a reassessment if they believe their aged care needs have changed, or it may be identified through a scheduled SPR.

Note:

In this manual, the term 'reassessment' is used to describe an assessment that occurs after an older person has already been assessed at least once.

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SPRs are used as a mechanism to adjust an older person's aged care services without needing to undertake a reassessment. In some cases, the Assessment Delegate may approve access to services based on updated information through the SPR process.

A reassessment will be required when there are *significant* changes to a client's needs or circumstances.

Significant changes in care needs and circumstances require higher-level of care or different types of care (and/or changes to priority).

For example, an older person approved for ongoing Support at Home at the Classification 4 level who requires a higher classification level of package (e.g. Level 5) due to increased care needs or a change in priority for home care service must first undertake a reassessment by an assessor and approved by an Assessment Delegate.

Significant change is referenced in section 64 of the *Aged Care Act 2024* and defined in the *Aged Care Rules 2025*:

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- a carer for the individual has permanently ceased to provide some or all care to the individual;
- the individual has experienced an event, or a decline in their condition, that is likely to mean that they will require:
    - more frequent access to a service they are already receiving, or
    - access to a service they have been approved for but are not currently receiving, or
    - access to new services not covered in the older person's access approval.

The Triage Delegate will determine whether an individual is eligible for a reassessment.

All reassessment requests begin through the SPR workflow in the assessor portal. A reassessment will be requested if required.

When a client undergoes a reassessment, the system will prompt assessors to review and update the client's urgency category, even if care needs have not changed.

Refer the user guide on how to conduct SPRs within the My Aged Care portal.

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10.1.1. Support Plan Reviews (SPRs)

The introduction of Support at Home expands the circumstances in which an SPR can be undertaken.

SPRs are most likely initiated by the older person's provider (with the older person's consent), who can submit a request through the My Aged Care service and support portal. When requesting SPRs, providers must attach supporting documentation about the participant's current care arrangements, such as their quarterly budget and/or care plan.

Alternatively, an older person or provider can ask for a SPR when:

- the older person's needs, goals or circumstances have changed,
- they need additional services that are not on their support plan, or
- a time limited service has ended.

An older person can request a SPR through My Aged Care or from a Services Australia Aged Care Specialist Officer. A SPR may lead to:

- no changes to the support plan as it meets the person's needs
- updates to the support plan to address changed needs; or
- a reassessment due to significant changes.

Where someone has made a request on behalf of the individual receiving the aged care service, it is important that the assessor confirms that the individual has consented to this occurring when beginning the SPR.

Team leaders are responsible for accepting an SPR and assigning it to an assessor. The assessor will review the information provided and determine whether the older person's updated needs can be addressed through a SPR or if a reassessment is required.

If the SPR is valid, any proposed changes to the Support Plan will require a decision by an Assessment Delegate. If a reassessment is required, the referral will proceed through the

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standard triage and assessment process, with new recommendations subject to delegate approval.

A key change which aims to reduce the need for SPRs is the flexibility of service recommendations in the IAT for any Support at Home classification. When an assessor accepts the Support at Home recommendation for a client, all services in the list will be pre-selected, with the exception of *Allied Health and Therapy* and *Therapeutic Services for Independent Living* service types. This is due to the specific nature of these services and should only be recommended if an older person has a need for those services.

10.1.2. Key principles of a Support Plan Review

An assessor may set a review date on the Support Plan at the time of the assessment or initiate the review on an ad-hoc basis. Unplanned/ad hoc reviews may be requested by the service provider or through the contact centre or ACSOs.

- The SPR may be completed over the phone with the older person, their appointed decision maker, or in line with the older person's will and preferences, their registered supporter.
- Assessors are best placed to make the decision as to whether an older person requires a reassessment following a review. This decision is supported by the information provided by the older person, the contact centre, service providers and health professionals.
- All SPRs are required to go through a delegate for approval.
- The My Aged Care contact centre has the ability to issue a direct referral to the assessment organisation for an urgent comprehensive assessment for residential care, residential respite care or transition care.
- If appropriate to the older person's aged care needs, a non-clinical assessor can create an assessment referral after starting the SPR.
- If an older person is admitted to hospital, it is best practice for an SPR to be conducted once the older person is discharged from hospital and there is a clear picture of the care needs and type and level of support that will be required.
- If an urgent referral is required before discharge, the SPR can be conducted in the hospital setting. This may mean that the referral needs to be transferred to an assessment organisation that is contracted to conduct assessments in a hospital setting (limited to State and Territory Governments). Alternatively, the assessor may contact the state or territory assessment organisation to self-refer directly.
- Where there is a significant change in an older person's needs or circumstances which affect the objectives or scope of the existing Support Plan, a reassessment may be undertaken. A reassessment can be the outcome of a SPR.

If not already scheduled earlier, a SPR may be routinely scheduled 12 months from the last assessment for older people with ongoing CHSP services in place. A reassessment is only required for significant changes in care needs or circumstances since the last assessment. The service provider is responsible for reviewing client services at least every 12 months.

- When conducting an assessment, assessors should be considering the current needs of the older person and not recommending services that aren't supported by the assessment.
- An unplanned SPR will replace the scheduled review in the system, and if necessary, can be re-scheduled at the completion of the unplanned review.
- An older person can have multiple reviews of their Support Plan linked to the same assessment.

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- If new WHS information is recorded on the Support Plan following a SPR for an existing older person, the assessor should advise the provider of the new information so the provider can make the appropriate risk-based determination of how best to support the older person's service delivery.

Once a support plan review has been commenced, an assessor will be able to make changes to information in the following sections of the older person's Support Plan:

- Assessment summary
- Older person motivations
- Goals & recommendations, including recommendations for linking support & reablement.
- Manage services & referrals
- Associated People
- Review

It is important for the assessor to keep in mind that generated support plans can include goals and concerns from all previous assessments. The assessor should remove and/or update previous goals to ensure the focus remains on the older person's current goals and aspirations as per their most recent assessment and/or SPR.

Prioritising Urgent SPRs

While no priority category for SPRs exists as it does for assessment referrals (outlined in Chapter 4) assessors should consider prioritising SPRs where there is an identifiable urgent need. In particular, assessors should prioritise:

- **End-of-Life SPRs,** completing them as soon as possible. These will be marked 'urgent' in the system.
- Referrals where referral information indicates a significant event has occurred or the older person has a rapidly deteriorating condition, all of which will likely result in a reassessment. This will help ensure prompt review by a Triage Delegate.
- Requests for **a second unit of restorative care,** particularly those where there is a need for continuity of services

Otherwise, all other SPRs should be completed within calendar 15 days from the date the SPR referral is accepted.

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10.1.3. Outcome of the SPR

After conducting the SPR, the assessor should consider possible outcomes, including: determining that no changes to the Support Plan are required (as it meets the older person's needs), updating the current plan, or conducting a reassessment.

The assessor can record the outcome to 'complete' the SPR and 'finalise' the SPR when it has been completed. If the SPR outcome is a reassessment, then the assessor is prompted to issue the assessment referral. The SPR referral will appear above the Assessment Summary Information in the older person's Support Plan.

Note:

A SPR should accurately reflect the review details, including date, attendees, mode, assessor name, reason for SPR and the outcome of the review (up to 1000 characters).

Assessors must ensure the older person or active, appointed decision maker (whether or not a registered supporter) agree to the details entered in the outcomes field as these comments will automatically appear on the older person's Support Plan.

The Assessment Summary section of the Support Plan has a 5000-character limit which can also be updated with the SPR. All past versions of the Support Plan are retained on the My Aged Care system and are a record of any deleted content.

After selecting 'complete & finalise Support Plan review' no further changes can be made. Where applicable (e.g. if new services have been added or if a decision has been made to not approve a specific request), a Notice of Decision will be required to be prepared for Delegate approval and shared with the older person.

The assessor may determine that the older person's needs or circumstances have changed significantly since their original assessment, and a reassessment is required.

10.1.4. Reassessments

An older person may require a reassessment following a SPR in the following instances:

- the older person has multiple new needs or significantly increased needs
- the older person requires a different service group (i.e. client receiving CHSP needs to move to Support at Home) the My Aged Care assessor portal allows a reassessment referral where:
- the SPR request meets one of the four defined scenarios only (transition care, residential care, residential respite care and older person relocation) or

- if the request does not meet the defined scenarios and the SPR clearly needs to be converted to a reassessment, the assessor can issue a reassessment referral where they select 'A reassessment required' as the outcome of the SPR or

- after the full SPR is completed and finalised, the assessor has the option to start a reassessment referral if this is appropriate.

Where the SPR outcome does not indicate a reassessment is necessary, but the person (or their active, appointed decision maker, whether or not a registered supporter) continues to request a reassessment, assessment organisations should be aware that making a decision not to proceed with a reassessment process is a reviewable decision under the Act.

If the triage delegate's clinical opinion (based on guidance materials and evidence) is that a comprehensive assessment is not required, the assessment organisation must ensure the older person:

- is aware of, understands and accepts this decision.

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- is provided with the updated support plan which details the outcome of the SPR and if applicable, references the reason/s to the older person why the requested reassessment is not required at this stage; and

- is provided with information on how to request a further SPR should the older person's care needs or circumstances change.

If the older person does not accept the decision, then the assessment should proceed.

Reassessment of a classification level

Depending on the classification type for the service group, an individual or a registered provider acting on behalf of the individual may have the right to apply for a reassessment of a classification level under section 82 of the Aged Care Act 2024. Section 82 outlines who may apply for a classification reassessment for each classification type for a service group and when an application may be made. This is outlined in the table below.

Table 54. Circumstances when a classification reassessment can be sought

Classification type for a service group	Who can apply for a classification reassessment	When can a classification reassessment be sought
Ongoing or short term for home support, assistive technology or home modifications	The individual	If: • the classification type is in effect for the individual; and • the individual considers a different classification level in the classification type for the service group should be approved; and • the funded aged care services are not being delivered under a specialist aged care program; and • it is considered the circumstances (if any) prescribed by the Aged Care Rules 2025 (the Rules) apply.
Ongoing for residential care	The individual A registered provider on behalf of the individual	If: • The registered provider is delivering ongoing funded aged care services to the individual through the service group in an approved residential care home; and • the applicant considers a different classification level in the classification type for the service group should be approved for the individual; and • the funded aged care services are not being delivered under a specialist aged care program; and • either of the following apply:

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Classification type for a service group	Who can apply for a classification reassessment	When can a classification reassessment be sought
		• if the rules prescribe a time period—not more than the number of applications prescribed by the rules have been made for the individual under subsection 82(2) of the Act in that time period; • it is considered the circumstances (if any) prescribed by the Rules apply.
Short term for residential care	The individual The registered provider on behalf of the individual	If: • the applicant considers a different classification level in the classification type for the service group should be approved for the individual; and • an access approval is in effect for the individual for the classification type for the service group; and • if the application is made by the registered provider: • the registered provider is delivering short-term funded aged care services through the residential care service group to the individual in an approved residential care home; and • those funded aged care services are not being delivered under a specialist aged care program; and • either of the following apply: • if the rules prescribe a time period—not more than the number of applications prescribed by the rules have been made for the individual under subsection 82(3) of the Act in that time period; • it is considered the circumstances (if any) prescribed by the Rules apply.
Hospital transition (for any service group)	A registered provider on behalf of an individual	All of the following apply: the registered provider is delivering hospital transition funded aged care services to the individual through the service group; and • the registered provider or the individual considers that an extension of the period of effect for the classification level that is in effect for the individual for the classification type for the service group should be approved for the individual.

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When a reassessment is needed (for all classifications expect those for the residential care service group), Triage Delegates will review the application, considering the individual's current care needs and whether they still meet the requirements for a classification reassessment.

If the application meets the necessary criteria, the assessor will complete a reassessment. The Assessment Delegate will decide whether to approve a different classification level for the classification type for a service group or an extension of the classification level (if relevant) under section 78 of the Act. All new decisions will be documented in a new Notice of Decision letter.

10.1.5. Criteria for SPRs and reassessments by program

The table below describes the circumstances in which a SPR is required versus a reassessment.

Table 55. Circumstances when an SPR is required versus a reassessment

Program	Support Plan Review	Reassessment
Ongoing Support at Home 1 8	Approval for additional service types, or for additional services within the prescribed service types that have already been included in the support plan and is within the current SaH classification. This can be submitted by the older person's Support at Home provider.	An older person's circumstances have changed significantly that is likely to mean that they will require a higher classification level, with more frequent or a different type of funded aged care service. e.g. the individual's caring arrangements have ceased, permanently, to provide some or all care to the individual; or the individual has experienced an event, or a decline in their condition.
Restorative care	Approval for additional service types, or for additional services within the prescribed service types that have already been included in the support plan during the restorative care episode, or to provide evidence that a second unit of funding is required (may consider availability of units).	To meet changing needs of the older person which may include needing an ongoing service type after an episode of restorative care has finished (or during the period if circumstances change).
AT HM	Changes to existing AT and/or HM funding tiers AT funding tier to access repairs or maintenance of an item listed on the AT-HM list. Addition of new AT and/or HM funding tiers for transitioned HCP recipients with insufficient HCP unspent funds (from November 2025).	Where there has been a significant change in needs which may include the individual requiring a higher ongoing Support at Home classification level or a different type of funded aged care service including a new need for AT and/or HM.

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Program	Support Plan Review	Reassessment
End of Life Pathway	Request an urgent SPR to be assessed for End-of-Life Pathway if the person already has a Support at Home classification. Request an urgent SPR to move to an ongoing SaH. classification if the person needs services beyond the End-of-Life Pathway funding period.	A person who does not have a Support at Home classification will need a reassessment to be approved for the End-of-Life Pathway.
Residential care (permanent)	N/A	Clients needing residential care who have not had residential care added as a care type to their support plan.
Residential care (respite)	N/A	Clients needing residential care who have not had residential care added as a care type to their support plan.
TCP	N/A	If the client receiving other aged care services enters hospital and needs TCP, a reassessment is required.
CHSP	To meet changing needs which may require additional CHSP services. To close off a period of reablement support and/or meet changing needs which may include needing an ongoing service type after episode of reablement has finished.	If a CHSP participant needs access to a different service type that they are not currently approved for. For example, Support at Home or residential respite care, a reassessment is required.
MPSP	If a client is receiving other aged care services and an MPSP service recommendation needs to be added.	New MPSP clients will require an assessment from 1 November 2025. If an existing MPSP client who had not previously been assessed (who were deemed across under transitional arrangements) needs to move to mainstream services, a reassessment should be undertaken.
NATSIFACP	If a client is receiving other services and a NATSIFACP service recommendation needs to be added.	New NATSIFACP clients will require an assessment from 1 November 2025. If an existing NATSIFACP client needs to move to mainstream services and

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Program	Support Plan Review	Reassessment
		hasn't been assessed before, a reassessment should be undertaken.

10.1.6. SPRs for Aboriginal and Torres Strait Islander assessment organisations

SPRs will usually be reallocated to the previous assessment organisation. As Aboriginal and Torres Strait Islander assessment organisations commence, an Aboriginal and Torres Strait Islander client may wish to transfer their SPR to an Aboriginal and Torres Strait Islander assessment organisation. In this case, the assessment organisation is expected to support a warm transfer of the assessment referral.

10.1.7. SPRs for AT-HM

Participants accessing assistive technology (AT) or home modifications (HM) can request an SPR:

- to seek a higher AT or HM funding tier
- to seek AT funding to meet their assistive technology repair or maintenance needs
- to seek allocation of an AT or HM funding tier if they are a participant with a transitional Support at Home classification (from November 2025).

Note:

If transitional clients don't have unspent funds or have insufficient unspent funds to meet their need for assistive technology and home modifications, they can agree for their providers to supply information indicating any additional funding needs through the AT-HM scheme data collection process.

This is a direct pathway where the department delegate may allocate an AT ongoing and/or AT/ HM low, medium or high short term funding tier.

This process will be available from 1 November 2025 until February 2026, and should be followed in the first instance before seeking an SPR.

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The following will require a reassessment:

- to allocate an AT or HM funding tier for the Restorative Care Pathway
- to allocate an AT funding tier for End-of-Life Pathway

If an SPR is requested for a higher AT or HM funding tier or for repair and maintenance of assistive technology providers will be required to submit evidence, along with the SPR request, for the aged care assessor to review:

- a valid prescription (if applicable) and
- a quote indicating costs of AT repairs or maintenance needs

10.1.8. SPRs for Restorative Care Pathway (RCP)

Restorative care partners can submit a SPR for several reasons related to the RCP including:

- Request approval for additional services which were not approved at assessment but are required to meet goals identified in the Goal Plan
- Request approval for additional unit of RCP funding to be accessed concurrently (subject to unit availability)
- Request a reassessment due to changing needs

Like other classifications, a provider can submit a SPR requesting additional services to ensure goals can be met.

Second unit of funding for Restorative Care Pathway

Under subsection 195-3A of the Aged Care Act 2024, an older person may access an additional unit of funding for use during their 16-week episode. Please note this is not a reviewable decision.

Access to a second unit of funding is requested through a SPR. A Clinical Assessment Delegate will need to consider written evidence provided to determine approval (refer to Chapter 6 for information on manual oversight of RCP units/places). Evidence includes written confirmation from a medical practitioner, registered nurse or allied health practitioner, or restorative care partner of the registered provider that the individual requires additional funding to access nursing care and allied health and therapy services to achieve restorative care outcomes as detailed in the goal plan. Further supporting evidence can include the goal plan, clinical assessment tool outcomes, and individualised budget. Where an older person is already receiving ongoing services, information should be provided to demonstrate adjustments to ongoing services is also not sufficient to achieve restorative outcomes in combination with their initial RCP unit of funding. Availability of RCP units may also be considered.

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In addition to RCP approvals confirmed after 1 November 2025, those with an active Short Term Restorative Care (STRC) approval (who did not start STRC before 1 November 2025), will have their approvals transferred into an approval for RCP.

Note for this cohort using their STRC approval to access the RCP:

- This cohort will also be accessing the RCP units of funding for the first six months from 1 November 2025.
- A second unit of funding to use within a single RCP episode can be requested via a SPR request.
    - However, the assessor will need to self-refer this for reassessment to grant access to a second unit of funding.
    - This is because the ability to add a second unit via SPR will not be available on the assessor portal for those with an STRC approval.
    - The reassessment can be done over the phone and does not require queuing for a face-to-face assessment.
    - The decision to approve a second unit will be informed by evidence submitted by the provider with the SPR request and may be informed by the availability of RCP funding units.
- When a request for a second unit of RCP is received assessors should confirm if there is approval for STRC and RCP on the client's record. If there is approval for

both, the assessor will need to confirm with the client if the client entered care under the RCP after 1 November 2025 using the STRC approval. If this is the case, then the assessor must not approve a third unit of RCP funding.
- If the participant is eligible to access an additional RCP unit, they must wait at least 12 months before accessing another episode.

Important: Second units of funding are counted as part of RCP cap management. Assessors and Assessment Delegates should stay informed of any communications from the Department's Assessment Delivery Section regarding RCP units when recommending and approving a second unit of funding.

For more information on the Restorative Care Pathway please refer to the Support at Home Manual.

Recommending ongoing services after/during a period of Restorative Care Pathway

Assessors should consider any potential needs after exiting from the RCP, it may be necessary to undertake a reassessment for ongoing funding towards the end of the RCP episode.

The intention of Restorative Care Pathway (RCP) is to improve levels of function and delay the need for ongoing or higher levels of ongoing aged care services. This can only be determined after the RCP episode has been completed. The restorative care partner could request a reassessment if it is anticipated ongoing services may be required or there has been a change in circumstances.

Important: Assessors should carefully consider the timing of reassessment during a RCP episode. Approval for an ongoing/new ongoing Support at Home classification will remove RCP access.

SPRs for the End-of-Life Pathway

SPRs are used in the context of the End-of-Life Pathway for the following reasons:

- For existing Support at Home participants, to move from their current ongoing Support at Home classification to the End-of-Life Pathway
- For participants accessing the End-of-Life Pathway who require services beyond the End-of-Life funding period, to move from the End-of-Life Pathway to an ongoing Support at Home classification

In both cases above, the SPR should be marked as an 'urgent' SPR.

Funding under the End-of-Life Pathway can be used for a maximum of 16 weeks. An urgent SPR can be requested any time after 12 weeks if it appears the participant will require services that exceed the End-of-Life funding period. The SPR will enable the participant to:

- Return to their previous ongoing Support at Home classification, if they were already receiving services under Support at Home, or

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- Transfer to the ongoing classification that was determined at assessment, in the case of participants who were new to Support at Home when they commenced the End-of-Life Pathway.

It is critical that SPRs to transfer a participant from the End-of-Life Pathway to ongoing services are prioritised in order to ensure there is no break in continuity of service. If a participant is returning to an ongoing Support at Home classification that is considered insufficient for their needs, a reassessment may be needed. However, the SPR to return the participant to their current ongoing classification should be completed first, in order to ensure funding is made available. After this, a reassessment can be requested.

Department of Health, Disability and Ageing website:

My Aged Care – Assessor Portal User Guide 3 – Managing Referrals for Assessment and Support Plan Reviews

My Aged Care – Assessor Portal User Guide 7 – Completing a support plan and support plan review

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11. Chapter 11: Reviewable decisions, revoking eligibility or approval decisions and complaints

What you'll find in this chapter:

This chapter provides information on assessment related reviewable decisions in accordance with the *Aged Care Act 2024 (the Act)*. It also details:

- the reconsiderations process
- the corrections process
- options for reviews and revocations
- the pathways that clients can take to submit complaints and raise concerns about their My Aged Care experience.

The primary audience for this section is assessors, team leaders, delegates and operational managers. Assessors should be aware that they are providing a valuable and trusted public role in the delivery of quality aged care assessment services on behalf of the Commonwealth. A necessary part of a quality assessment is having supporting processes that allow the older person the right to complain without fear of reprisal, while also upholding the statement of rights and principles.

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11.1. Reviewable decisions

The Act broadens the scope of reviewable decisions related to the assessment process. It is essential for all delegates to be aware that certain decisions can be reviewed, and to ensure that every decision made is thoroughly documented and supported by evidence.

Section 557 of the Act outlines the decisions made by the System Governor that are subject to review, including those related to assessments and assessment-related activities. This section also identifies the specific entities affected by each reviewable decision.

An affected entity for a reviewable decision is a party that has the right to seek a review of a decision. To find out whether a person is an affected entity in relation to a reviewable decision refer to column 2 of section 557 of the Act.

An older person's registered supporter/s can communicate the decision of an older person to seek a review of a decision. It is not the role of a registered supporter to make decisions for an older person. If an older person has an active, appointed decision maker, that person may make a decision on behalf of an older person to seek a review of a decision. They may only do this if this decision is within the scope of their legal authority and that legal authority is active.

11.1.1. Reviewable decisions related to assessment

Table 56 is an excerpt of the table in Section 557 of the Act relating to decisions made by the System Governor that relate to assessment.

Table 56: Reviewable decisions made by the System Governor that relate to assessment

Item	Decision	Simplified explanation	Entity
7	A decision under subsection 57(1) not to make an eligibility determination for an aged care needs assessment for an individual	Deciding that an individual is not eligible for an aged care needs assessment	The individual (the older person)
8	A decision under subsection 64(1) that a reassessment of an individual's need for funded aged care services is not required	No need for reassessment: Deciding that an older person does not need a support plan review or reassessment of their aged care needs	The individual (the older person)
9	A decision under subsection 65(1) that an individual does not require access to funded aged care services	No need for aged care services: Deciding that an older person does not need funded aged care services	The individual (the older person)
10	A decision under subsection 65(2) not to approve a service group, or a classification type for a service group, a service type, or a funded aged care service, for an individual	Not approving certain services: Deciding not to approve a service group, service types or services, or classification types for an older person	The individual (the older person)
11	A decision under subsection 65(4) that exceptional circumstances do not apply in relation to an individual	No exceptional circumstances: Deciding not to approve access where an older person has not	Each of the following: (a) the individual (the older person);

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Item	Decision	Simplified explanation	Entity
		undergone a needs assessment.	(b) the registered provider
12	A decision under subsection 71(2) to not specify an earlier day in a notice of decision under section 70	Not setting an earlier date: Deciding not to backdate the date of approval in the notice of decision for an older person.	The individual
13	A decision under subsection 71(6) to reject an application for a longer period for an individual to make an application	Rejecting a longer application period: Deciding not to give an older person more time to submit an application to have their date of approval backdated	The individual (the older person)
14	A decision under subsection 74(1) to revoke an eligibility determination for an aged care needs assessment for an individual	Revoking eligibility for an assessment: deciding to cancel an older person's eligibility for an assessment	The individual
15	A decision under subsection 74(1) to revoke an access approval for an individual	Revoking eligibility for aged care: Deciding to cancel an older person's eligibility for aged care services	The individual (the older person)
16	A decision under subsection 78(1) to establish a classification level for an individual for a classification type for a service group	Setting a classification level: Deciding on a classification level for an older person for a specific classification type in a service group	Each of the following: (a) the individual; (b) if a copy of the notice of the decision is required to be given to a registered provider

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Item	Decision	Simplified explanation	Entity
			under subsection 79(3)—the registered provider
17	A decision under subsection 83(1) to change a classification decision (the original decision) for an individual	Changing a classification decision: Deciding to change a previous classification decision for an older person	Each affected entity for the original decision
18	A decision under subsection 86(1) to assign a priority category for a classification type for a service group	Assigning a priority category: Deciding on a priority level for an older person for a specific service group	The individual
19	A decision under subsection 90(1) to change a decision about an individual's priority category for a classification type for a service group	Changing a priority category: Deciding to change an older person's priority level for a specific classification type for a service group	The individual (the older person)

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11.2. Reconsiderations process

If an affected entity is not satisfied with a decision that is reviewable under the Aged Care Act 2024 (the Act), they are encouraged to first contact their assessment organisation to discuss their concerns in the first instance. The affected party may also submit a written **reconsideration request within 28 days** of receiving the decision notice to:

The System Governor
Department of Health, Disability and Ageing
Attn: Review of Decisions Section
GPO Box 9848
ADELAIDE SA 5001

This request must set out reasons why they are seeking a review. The System Governor can allow further time for someone to make a request for reconsideration (see subsection 559(3)(c) of the Act.)

The reconsideration will be conducted by an internal decision reviewer who is different from the original decision-maker, holds equal or higher position and was not involved in the making of the original decision.

The internal decision reviewer will be a departmental delegate of the System Governor and will carry out a comprehensive administrative review of the original assessment organisation's decision.

They will consider all relevant information, including new evidence from third parties before making a determination. They must also, within 14 days of receiving the request, provide the affected entity written notice that the request has been received and when it was received. The notice must also set out that if the internal reviewer has not provided notice of their decision within 90 days of receiving a request, the original decision has been affirmed.

The internal decision reviewer must make a decision within **90 days** after receiving the request. They may:

- Affirm the original reviewable decision.
- Vary the original reviewable decision.
- Set the reviewable decision aside and make a new decision.

After making their decision, the internal decision reviewer must give written notice of the following to each affected entity for the reviewable decision:

- the reconsideration decision;
- the day the reconsideration decision was made;
- the reasons for the reconsideration decision;
- details of the affected entity's right to apply to the Administrative Review Tribunal for review of the reconsideration decision.

If the affected entity is still not satisfied after the reconsideration, they may apply for a further review by the Administrative Review Tribunal.

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11.2.1. The role of assessors in reconsiderations

During the reconsideration process, the Departmental delegate will discuss the request with the assessor through the assessment organisation's Operational Manager. This step helps clarify any matters related to the case.

Assessment organisations play a vital role in the reconsideration process. They will be invited to provide additional information in response to the person's claims, including the rationale for their decision making, which will be carefully considered as part of the administrative review.

11.2.2. New point in time assessment

If the Internal Review Officer identifies that there has been a significant change in the older person's circumstances since the original decision, they may discuss with the older person, the option of pursing a reassessment and withdrawing their review request.

If the older person decides to withdraw their review request, the Department will facilitate the reassessment and cease to deal with the matter.

Important:

The Department cannot discontinue the review process unless the older person chooses to withdraw their application.

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If the older person decides to pursue a new point-in-time reassessment, the Internal Review Officer will instruct the assessor to conduct a reassessment.

11.2.3. Supplementary off-line assessment by assessment organisation to inform the reconsideration process

When a review officer determines that a supplementary off-line assessment is required to support a review decision, they may request that it be undertaken. This scenario typically arises when it appears that an incorrect decision may have been made, but the Internal Review Officer requires updated information to determine the most appropriate assessment outcome. The outcome of this assessment will contribute to the body of evidence considered as part of the review process. This process is distinct from a reassessment, because a reassessment stems from a change in circumstances. In the case of a reassessment, the outcome would not be backdated to the time of the original assessment. Requests for off-line supplementary assessments are infrequent and are only made when necessary to support a thorough and fair reconsideration process.

Through the Assessment Organisation's Operational Manager, the Internal Review Officer will request the off-line supplementary assessment in writing. It will be necessary to use the paper-based version of the Integrated Assessment Tool (accessible from the My Aged Care assessor portal) or other form as specified by the Internal Review Officer.

The off-line supplementary assessment is usually performed by an assessor who was not involved in the original decision or by a different assessor from the same organisation. To ensure a comprehensive evaluation, the reassessing assessor can collaborate with the original assessors, the original Assessment Delegate, and any other relevant parties as needed.

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The assessor must not discuss the supplementary off-line assessment outcome with the older person or any other party in any way after completing the assessment. The outcome of the supplementary off-line assessment is not recorded in My Aged Care by the assessment organisation. Instead, it is shared with the Department through the Assessment Organisation's Operational Manager.

11.3. Further avenues of review

If affected entities remain dissatisfied with the outcome of the review, they can apply to have their reconsideration decision reviewed by the Administrative Review Tribunal (ART) and the Commonwealth Ombudsman.

If an affected entity has concerns about the way a decision was made or the processes involved, they can make a complaint to the Commonwealth Ombudsman.

11.3.1. Administrative Review Tribunal (ART)

If a person who has requested a reconsideration of a decision is not satisfied with the outcome, they may apply to the ART for a further review. It is important to note that there is a cost to the applicant for initiating this process.

Assessment Delegates must ensure that all information used in making approval decisions, including any data gathered during reviews of reviewable decisions is properly maintained and readily available for review by the ART.

Both the Departmental delegate and the Assessment Delegate who made the original decision may be required to appear before the ART as part of the review process.

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11.3.2. Commonwealth Ombudsman

The Commonwealth Ombudsman is responsible for considering the administrative actions and decisions made by Australian Government agencies. The Commonwealth Ombudsman will not make a fresh decision on the matter, rather they will consider the way a decision was made and make recommendations on how the decision or process could be improved.

The Ombudsman's office handles complaints, conduct investigations, performs audits and inspections and carries out specialist oversight tasks to determine whether the actions and decisions of agencies are wrong, unjust, unlawful, discriminatory or unfair.

The older person, or any person supporting them such as their carer, advocate or registered supporter, can contact the Commonwealth Ombudsman through the official website to raise their concerns or file complaints.

11.4. Revocations

Triage and Assessment Delegates are not delegated the power to consider or decide to revoke an older person's eligibility or approval decisions. These delegated powers are exercised by department delegates (delegates employed directly by the department).

11.4.1. Revocations on the initiative of the System Governor

There are specific circumstances where an approval or eligibility decision may be revoked. One scenario is that during the assessment or application process the individual gave

information or documents and those information or documents were false or misleading, omitted any matter or thing that without would make the document false or misleading. This can include situations where key facts presented during the assessment process were inaccurate or misleading, resulting in the approval or eligibility decision being granted erroneously. In such cases, it is the departmental delegate's responsibility to assess the evidence and, if warranted, initiate the revocation process to maintain the integrity of the aged care system.

Decisions to revoke an eligibility determination for an aged care needs assessment and access approval for an individual are reviewable decisions under Section 557 of the Aged Care Act 2024.

If an assessor or assessment delegate has concerns about the information or documents provided by an older person and/or their registered supporter(s) or appointed decision makers, they should contact the Department at AssessmentReovactions@health.gov.au

Before making a final decision to revoke eligibility or access approval, the Departmental delegate must follow the structured process outlined under the Act. The Departmental delegate must first notify the individual in writing that a decision to make a revocation is being considered. The notice must clearly state the reasons why a revocation is being considered and invite the individual to make written submissions about the matter within 14 days of receiving the letter (or a longer period if specified). Additionally, the notice must inform the individual that the Departmental delegate may proceed with the decision after considering the submissions.

If an individual has made their submission, the Departmental delegate is required to carefully consider them before making a final decision. This ensures that the individual's perspective and any relevant information are taken into account, allowing for a transparent and fair assessment of the situation.

If, after considering the submission, the Departmental delegate deicides to revoke the eligibility determination or access approval, they must notify the individual in writing within 14 days of making the decision. The notification must include the decision itself, the reasons for the decision, and information on how to apply for a reconsideration if the individual wishes to challenge the outcome.

If an eligibility or access approval is revoked, any pending applications related to the individual are automatically withdrawn. This means the individual will need to reapply for access if they wish to receive funded aged care services.

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11.4.2. Requests on the initiative of the individual

Approvals can be revoked if the individual themselves requests it. Under section 72 of the Act, an individual has the right to request the revocation of an eligibility determination or an access approval if it is currently in effect. This option to withdraw an eligibility approval is only available if the individual is under the age of 65 at the time of making the request. The request for revocation must be submitted using the approved form to ensure that the process is formally documented and consistent with legislative requirements. Once a valid request for revocation has been made, the System Governor is obligated under section 73 to revoke the eligibility determination or access approval within 28 days of receiving the request. The decision must be communicated to the individual within 14 days of being made in the form of a written notice. This notice should clearly outline the revocation decision, including any relevant reasons and implications.

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Note:

Once an approval or eligibility determination is revoked, any pending applications related to that individual under section 56 or 64 are automatically considered withdrawn.

This means that no further action will be taken on those applications.

Additionally, approvals lapse automatically if they are superseded by a subsequent decision. This occurs when a new eligibility determination or access approval replaces the existing one, rendering the previous approval invalid. In these cases, the revocation happens implicitly because the new decision takes precedence.

11.5. Corrections process

Assessment delegates are responsible for ensuring their decisions are recorded accurately and completely. Diligent quality checks are essential to minimise the need for corrections and maintaining accurate records.

If an administrative or typographical error is identified after submitting a decision, assessment delegates must promptly initiate the corrections process. As an example, errors could include an omission of funded care types from an individual's approval that were recommended in the Support Plan and the delegate intended to approve; or entering an incorrect approval date of effect that does not match the actual approval date of effect.

Where an error has been identified, an assessment delegate must request a 'correction' **within 42 days of the original decision**. Corrections should be requested via the 'Decision History' tab in the My Aged Care Assessor Portal using the 'Request Changes to care approval decisions' button. Additional information that does not fit in the free text field should be forwarded to the department for consideration, via email at the following address: SASP.Reconsiderations@Health.gov.au.

The reason for the correction must be recorded when lodging the request. For example, "*Ongoing residential care omitted from online approval process, evidence of an ongoing residential care recommendation in Support Plan*". For the department to agree to the correction, the assessment delegate's intention (as at the time the decision was made) should be clearly evident though assessment documentation and/or other supporting documents on My Aged Care.

If the assessment information is not consistent with the correction request, the department will reject the request. In instances where a client's needs change after the original decision, it is required that a reassessment is undertaken.

In situations where the Assessment Delegate has reconsidered their decision and changed their mind after recording the approval (based on additional information they have received), a correction request is not appropriate, and a reassessment is required. Any correction requests received by the department for this reason will be rejected.

A correction cannot be requested where service referrals have been issued for services. Where a correction is required for an assessment and service referrals have been issued, the assessment organisation must recall all services in an 'issued' state before they can request a correction.

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If it is identified a correction is required after a service referral has been accepted or services have commenced, the correction should be escalated to the department via email at the following address: SASP.Reconsiderations@Health.gov.au

11.6. Complaints

Older people (and/or their carer/advocate/registered supporters) have the right to raise their concerns about the information, service or care they have received from My Aged Care, their assessor or service provider.

There are different ways to make a complaint depending on the part of My Aged Care that the concern relates to, such as:

- the My Aged Care Contact Centre
- aged care assessment with an assessor
- the outcome of an aged care assessment
- the care and services received from a service provider; or
- the conduct of a registered supporter.

11.6.1. Concerns about My Aged Care

An older person or registered supporter should discuss their concerns about the service or information they receive from My Aged Care with the contact centre in the first instance.

If they are unable to resolve the issue, My Aged Care will provide a reference number to track the progress of the complaint. A person can make a complaint by:

Calling My Aged Care on 1800 200 422.

Posting their complaint to:

My Aged Care Complaints
PO Box 1237
Runaway Bay QLD 4216

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An assessor can make a complaint or escalate an issue about contact centre services by calling the My Aged Care Service Provider and Assessor Helpline on 1800 836 799.

If an older person, assessor or provider is not satisfied with the response received, they can take further action by sending an email with the detail of their complaint, and their My Aged Care reference number to: myagedcaresupport@health.gov.au

11.6.2. Concerns about the assessment

Assessment organisations are required to have a complaints procedure in place.

If a person has concerns about their assessment, they are advised to contact the assessor or their assessment organisation in the first instance.

If the department receives a complaint through My Aged Care it will be referred to the relevant assessment organisation for investigation and/or resolution. The assessment organisation will report back to the department on the outcome.

If the person cannot first resolve the issue with their assessor or their organisation, they are advised to call My Aged Care for assistance on 1800 200 422. Complaints relating to assessment organisations are escalated to the department for investigation.

My Aged Care Complaints and

My Aged Care Quality in Aged Care

11.6.3. Complaints about an aged care provider

If an older person (and/or their carer/advocate/registered supporter/appointed decision maker) is unhappy with any aspect of the care or services being received through an aged care provider they can:

- Speak to their service provider about their concerns
- make a complaint to the Aged Care Quality and Safety Commission (ACQSC):
    - By calling 1800 951 822
    - By completing an online form on the commission's website
    - In writing to:

      Aged Care Quality and Safety Commission
      GPO Box 9819, in your capital city

An assessor can also make a complaint with the ACQSC if they have concerns about an aged care provider.

In addition to the above, complaints about care received from Multi-Purpose Service Program (MPSP) providers or Transition Care Program providers can be referred to the relevant state and territory health department complaints bodies.

MPSP providers also have an obligation, under their MPSP agreement with the Commonwealth, to ensure their respective state or territory is advised when complaints have been made by an individual about the aged care or health services being delivered.

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ACQSC: Aged Care Service Provider Complaints

ACQSC: Lodge a Complaint

11.6.4. Complaints and concerns about registered supporters

Any person or organisation can raise a complaint or concern with the System Governor relating to a registered supporter's conduct, including alleged non-compliance with the duties of a registered supporter. The System Governor can suspend and/or cancel the registration of a supporter. This may occur at the request of an older person or registered supporter, or at the initiative of the System Governor.

Complaints or concerns can be raised by anyone. This includes an older person, their other registered supporters, appointed decision makers, aged care providers or workers, medical

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or allied health practitioners, advocates or any other person who is concerned for the welfare or treatment of themselves or the older person.

Assessors have a role in raising or handling complaints, concerns, or requests to cancel the registration of a supporter by escalating any relevant information to the departmental delegate responsible for supporters. This includes any request from an older person or their registered supporter to cancel the relationship where the circumstances mean the registered supporter may be suspended under the Aged Care Act 2024 (the Act), or any other complaint or information that suggests a registered supporter is not complying with their duties under the Act. This includes anything an assessor notices at an assessment.

Complaints about aged care providers, including their engagement with registered supporters, can be made to the ACQSC.

11.6.5. Complaints about aged care policies

Complaints related to Australian Government aged care policies, guidelines or decisions should be referred to the Department of Health, Disability and Ageing.

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12. Chapter 12: Supporting diverse experiences and needs

What you'll find in this chapter

This chapter outlines the ways in which the aged care system supports an older person's diverse needs by ensuring they have access to person-centered aged care assessments and services. This includes valuing older people, their identities, cultures, abilities, diversity, beliefs and life experiences. Persons of diverse needs includes older people who are:

- Aboriginal and Torres Strait Islander people
- People from culturally and linguistically diverse backgrounds
- People who live in Remote and Very Remote areas
- People who are Financially or Socially Disadvantaged
- Veterans
- People who are Homeless or at Risk of being Homeless
- Care Leavers
- Parents separated from their children by Forced Adoption or Removal
- Lesbian, Gay, Bisexual, Trans, Intersex, and other Gender Diverse people (LGBTI+)
- Are an individual with disability or mental ill-health
- Are neurodivergent
- Are deaf, deafblind, vision impaired or hard of hearing
- Other Groups (People with Dementia, palliative care needs etc.

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12.1. Supporting diverse needs during an assessment

The Department of Health, Disability and Ageing, Australian Government agencies, aged care assessment organisations, providers and the aged care workforce must ensure that older people have access to person-centred aged care assessments and services. This includes valuing older people, their identities, cultures, abilities, diversity, beliefs and life experiences.

The Aged Care Diversity Framework provides guidance for an accessible aged care system for every older person.

The Statement of Principles in section 25 of the Aged Care Act 2024 (the Act) provides for an aged care system that offers accessible, culturally safe, culturally appropriate, trauma-aware and healing-informed aged care services, based on the needs of the individual, regardless of their location, background and life experiences. This may include individuals who:

- are Aboriginal or Torres Strait Islander persons, including those from stolen generations
- are veterans or war widows
- are from culturally, ethnically and linguistically diverse backgrounds
- are financially or socially disadvantaged
- are experiencing homelessness or at risk of experiencing homelessness

- are parents and children who are separated by forced adoption or removal
- are adult survivors of institutional child sexual abuse
- are care-leavers, including Forgotten Australians and former child migrants placed in out of home care
- are lesbian, gay, bisexual, trans/transgender or intersex or other sexual orientations or are gender diverse or bodily diverse
- are an individual with disability or mental ill-health
- are neurodivergent
- are deaf, deafblind, vision impaired or hard of hearing
- live in rural, remote or very remote areas.

It is important to understand that individuals may identify across more than one group and may have a variety of special and diverse needs that will need to be recognised and taken into consideration.

During the assessment process, assessors must consider how they can create a safe assessment setting and ensure older people have a trusted support person present if needed. This may be a carer, partner, registered supporter, friend or perhaps a member from their 'family of choice' (who may or may not include biological family). This will help to build trust and ensure that an assessor can collect all information necessary to develop an appropriate and tailored Support Plan with the older person that considers their diverse needs.

It is important to recognise that many older people with diverse needs, characteristics and life experiences may have experienced exclusion, discrimination and stigma during their lives and may not feel safe to reveal such potentially sensitive information in an assessment.

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Aged Care Diversity Framework

12.2. Understanding cultural safety for older Aboriginal and Torres Strait Islander people

Assessors are required to complete an introduction to cultural safety as part of the induction training through MAC Learning to ensure they understand why cultural safety is important in providing safe aged care experiences for older Aboriginal and Torres Strait Islander people.

The National Aboriginal and Torres Strait Islander Ageing and Aged Care Council's (NATSIAACC) definition of cultural safety (referenced below) was co-designed in 2024 and included in the revised explanatory memorandum accompanying the Aged Care Bill 2024. All workers in the aged care system, including assessment staff, are expected to critically self-reflect and take responsibility for building an understanding of how they can improve their approach to culturally safe care in their daily practice.

It is also required that assessment organisations provide their staff with additional cultural safety and trauma aware, healing informed training relevant to the customs and protocols local to the area in which they operate. Further to this, itis recommended that assessment staff undertake additional training on how to understand and support the Stolen Generations. As at 2022, all Stolen Generations survivors are aged 50 or over and therefore may be eligible to receive aged care services. Many Stolen Generations survivors live in urban and

regional locations where there are few, if any Aboriginal and Torres Strait Islander community controlled aged care services and facilities.

When assessing Aboriginal and Torres Strait Islander clients, it is important to be guided by the individual's preferences, and observe body language and respond respectfully. If appropriate, assessors are encouraged to tailor their assessment approach to the specific needs of individuals to ensure that their support requirements are accurately reflected in their support plans. This may include:

- using a trusted cultural broker, or advocate,
- using supplementary assessment components of the IAT that are best suited for assessing the older person's needs, and/or
- developing relationships that support regular interactions and mentorship with existing and trusted health services and specialist providers located within a local community.
- Working with existing Aboriginal Community Controlled Organisations (ACCOs) Aboriginal Community Controlled Health Organisations (ACCHOs) affiliates and Indigenous organisations who specialise in providing aged care services where they are available.
- Using the Kimberley Indigenous Cognitive Assessment (KICA) assessment tools and the Good Spirit, Good Life guide in the Integrated Assessment Tool (IAT) for older Aboriginal and Torres Strait Islander people. These have been validated as the most acceptable and reliable instruments for assessing the needs of Aboriginal and Torres Strait Islander people.

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Aboriginal and Torres Strait Islander aged care | Australian Government Department of Health, Disability and Ageing

The KICA and the Good Spirit, Good Life guides are in the IAT User Guide

NATSIAAC definition of cultural safety

'Cultural safety requires understanding of one's own culture and the impact that your culture, thinking, and actions may have on the culture and wellbeing of others through ongoing critical self-reflection.

Only the care recipient themselves can determine whether the service is culturally safe. Ensuring access to a culturally safe, respectful, responsive and racism free aged care system is inherent for the optimal safety, autonomy, dignity, and absolute wellbeing of Aboriginal and Torres Strait Islander Elders, senior and older people, their families and community.

Aged care service providers and workers must take responsibility for building trust and relationships with Aboriginal and Torres Strait Islander service users, and their families, and for creating a new aged care system which centres on their living experience, cultural, and ageing needs, as determined by Aboriginal and Torres Strait Islander service users themselves.

The implementation of a trauma aware, healing informed approach to professional practice, and facilitating a greater understanding and respect for individual and collective cultures, histories, knowledges, traditions, stories, and values of Aboriginal and Torres

Strait Islander service users, their families and communities, will greatly support the delivery of a quality and culturally safe aged care system.

Aged care service providers must also firmly commit to continuously measure and improve structures and behaviours necessary for cultural safety and quality support to remain embedded in the Australian aged care system'.

12.3. Cultural safety for other cohorts

Cultural safety is an important consideration for all culturally distinct groups, for example culturally and linguistically diverse and lesbian, gay, bisexual, trans/transgender, intersex+ communities. It's important for assessors to recognise and respect the identities and customs of all older people who are culturally different from themselves, to provide equitable outcomes and quality assessment services.

Respecting a person's identity, culture and diversity in aged care should focus around understanding their individual needs and preferences and providing an assessment that is reflective of and responsive to their social, cultural, linguistic, religious, spiritual, psychological, medical and other needs, including cultural safety.

Assessments for all older people, regardless of culture or background, should be conducted in a way that is:

- **Welcoming and open-minded:** an assessor truly listens to the older person and works from the older person's cultural perspective, rather than their own
- **Respectful:** recognises their cultural identities and customs and does not challenge, assault or deny the identity of the older person
- **Safe, inclusive and flexible:** meets the older person's needs, expectations and rights, and is supportive of diverse characteristics and life experiences
- **Collaborative:** shares meaning, knowledge and experience through meaningful dialogue between the older person and the assessor
- **Self-determined:** provides choice, participation and control to the older person, and allows them to make decisions about matters that affect them

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Aged Care Diversity Framework action plans | Australian Government Department of Health, Disability and Ageing

Partners in Culturally Appropriate Care (PICAC)

Working with Diverse Groups in Aged Care

Australian Migrant Resource Centres

12.3.1. Aboriginal and Torres Strait Islander assessment organisations

As a part of the Single Assessment System, Aboriginal and Torres Strait Islander assessment organisations began being rolled out from August 2025. These assessment organisations provide a choice for older Aboriginal and Torres Strait Islander people seeking

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access to a culturally safe aged care assessment. A small number of organisations will commence providing these services initially and over time, these services will extend their reach and progressively cover more areas across Australia.

A culturally safe assessment process will help to improve the experience for older Aboriginal and Torres Strait Islander people and increase their uptake of aged care services. This will support them to maintain their independence at home for longer.

The organisations will help older Aboriginal and Torres Strait Islander people, their families, and carers, to access aged care services across urban, regional, and remote Australia.

Aboriginal and Torres Strait Islander assessment organisations will:

- Take a less formal yarning approach to assessments to make the older Aboriginal and Torres Strait Islander person feel comfortable.
- Undertake face-to-face assessments, where possible. This could be in the older person's home, at a community centre, or outdoors at a place of the older person's choosing.
- In line with the older person's wishes, welcome the presence of the older person's family member, advocate or registered supporters, to be part of the meetings.
- Allow for multiple visits, if required, to build trust and develop a relationship.
- Be embedded within the local community. Connecting with the local community with their knowledge of local services, customs and protocols will allow them to support matching appropriate assessors to the older person's preferences and needs.
- Be supported by connection to community to gather information about the older person's health and wellbeing to understand the aged care services they need prior to meeting them. This will limit the amount of information that the assessor needs to draw from the assessment, which will help to limit the number of times that the older person needs to re-tell their story.
- Maintain a connection with the older person for the whole journey to receiving services, through Elder Care Support workers. This will help to manage any uncertainty or questions throughout the process.
- Work with organisations that support Stolen Generation survivors.
- Provide interpreting services when needed.

Until an Aboriginal and Torres Strait Islander service is available in their area, older Aboriginal and Torres Strait Islander people can receive aged care assessments via an existing assessment organisation. Once an Aboriginal and Torres Strait Islander organisation becomes available, older Aboriginal and Torres Strait Islander people will have the choice to be assessed through either assessment pathway.

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More information available at - Aboriginal and Torres Strait Islander Aged Care Assessment Organisations.

12.4. People with dementia

Under the Statement of Rights in section 23 of the Aged Care Act 2024 (the Act), an individual has a right to equitable access to an assessment in a manner that is accessible and suitable for individuals living with dementia or other cognitive impairment.

The Australian Government recognises the unique needs of people with dementia and their families, registered supporters or other people who support them, and representatives.

Assessors should foster links with dementia-specific services, including Dementia Australia and Dementia Support Australia (DSA), and where relevant, include this expertise in the assessment process. This will facilitate an understanding of how best to communicate with older people with dementia. It will also assist assessors to better understand the needs of people living with dementia and their care partners, families, and representatives, and assist to improve linkages, integrated care, and access.

Assessors should be particularly alert to concerns about cognitive impairment or people who indicate a previous diagnosis of dementia. Referrals to the National Dementia Helpline or a GP should be considered where concerns about cognitive impairment are raised or where there is a diagnosis of dementia but the person, their registered supporters or other people who support them are not receiving the dementia-specific support they need. Assessors can request a call back for people or their carers who have concerns about dementia (with their consent) from the National Dementia Helpline through the Assessor Portal and the Aged Care Assessor App. A trained professional from Dementia Australia will then call the older person and speak to them about dementia-specific services and supports that might be of assistance.

Note:

A person does not need to have a formal dementia diagnosis to be referred to the National Dementia Helpline.

People living with dementia can experience behaviour changes, known as behavioural and psychological changes of dementia (BPSD), which impact their care and quality of life. Personalised support services are available from Dementia Support Australia (DSA) to help carers and service providers anywhere nationally to develop strategies that optimise function and support unmet needs for people impacted by BPSD and assessors can make referrals for support (with appropriate consent of care network as relevant) via DSA's 24-hour helpline or online.

Assessors must use their professional judgment if an older person has dementia or is cognitively impaired. In these cases, the input of registered supporters or other people who support the older person and/or advocates is particularly important.

Note: assessors should be aware that applying professional judgement might be especially difficult when working with Aboriginal and Torres Strait Islander older people and older people from Culturally and Linguistically Diverse backgrounds living with dementia or cognitive impairment. Factors such as language barriers, different concepts around ageing and dementia, a lack of awareness of dementia among family members and the additional stigma attached to dementia in some cultures can all make assessment more complex. Some culturally appropriate dementia resources are included under further information below.

Assessors may find the *Clinical Practice Guidelines* and *Principles of Care for People with Dementia* (the Guidelines) useful. The Guidelines provide recommendations for the diagnosis and management of dementia and are intended for use by staff working with people living with dementia in the health and aged care sectors, including GPs. Assessors can refer to the IAT user guide on how to answer some questions through the lens of an older person with cognitive difficulties such as dementia (e.g. physical mobility). Assessors are required to complete a Dementia specific training module in MAC Learning as part of their training.

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Companion documents to the Guidelines include a Health Professional Quick Reference Guide, and for people living with dementia and their carers the *Diagnosis, treatment and care for people with dementia: A consumer companion guide.*

Dementia Australia website:

Resources for Aboriginal and Torres Strait Islander communities

Dementia Support Australia website:

Nationwide, 24-hour dementia carer support | Dementia Support Australia

Department of Health, Disability and Ageing website:

My Aged Care – Assessor Portal User Guide 2 – Registering support people and adding relationships

What we're doing about dementia | Australian Government Department of Health, Disability and Ageing

University of Sydney (Cognitive Decline Partnership Centre) website:

Clinical Guidelines for Dementia

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12.4.1. Training and tools for health and aged care professionals

- Accredited training, education, upskilling and continuing professional development for the workforce providing dementia care in the primary, acute, and aged care sectors is available through Dementia Training Australia.
- The Wicking Dementia Research and Education Centre at the University of Tasmania offer two online courses known as MOOCs (Massive Open Online Courses): Understanding Dementia and Preventing Dementia.
- A Dementia Outcomes Measurement Suite (DOMS) provides tools for the assessment of various aspects of dementia.

Dementia Australia website: Culturally Appropriate Dementia Assessment Tools

Dementia Training Australia website: Dementia care training, education and resources for health and aged care professionals

University of Sydney (Cognitive Decline Partnership Centre) website:

Assessment process diagram for dementia diagnosis

Dementia Centre for Research Collaboration (DCRC) website:

Dementia Outcomes Measurement Suite (DOMS) - Tools for the assessment of various aspects of dementia

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University of Tasmania website:

Understanding and Preventing Dementia, Massive Open Online Course

12.5. People who live in remote and very remote areas

A small number of older people live in isolated areas. These locations are classified using the Modified Monash Model (MMM). Whilst recognising face-to-face assessment is good practice and should be the first option, this mode of assessment is not always possible for older people living in remote areas. In these circumstances, assessments may be conducted using non-face-to-face technologies such as telephone or telehealth. Where this occurs, a suitably qualified person from within the local health service or community care provider should be present to support the older person and to facilitate the assessment.

Assessors should develop and maintain good working relationships with health and community workers in rural and remote communities who may be called upon to assist with assessments and provide information and community needs and local services.

12.6. People who are financially or socially disadvantaged

Financial or social disadvantage can often create a significant barrier for people to access a wide range of services in the community. Assessors should ensure that they develop and promote links with organisations in their area which attempt to overcome these barriers and provide assessments to people who may benefit from services regardless of their financial or social circumstances.

People who are financially or socially disadvantaged may also experience difficulties in accessing services after their approval. Assessors should be prepared to engage in a wide range of care coordination activities on behalf of older people to ensure that they receive the care which they need and to which they are entitled.

From 1 November, financial hardship arrangements will continue to be available if an older person can't afford to contribute to the cost of their aged care, both in residential care and in-home care. An older person will be assessed on their specific circumstances. If approved for hardship assistance, the Australian Government will pay some (or all) of their aged care fees. The government will pay any approved amounts to the aged care provider on the older person's behalf. If an older person is required to pay some of their fees, they will continue to pay those to their provider.

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To apply for financial hardship assistance, an older person must meet certain requirements and complete the Aged Care Claim for Financial Hardship Assistance form. This form is sent to Services Australia to assess the application and they will let the older person know in writing of their decision and what assistance they are eligible for. This form should be submitted by an older person once they start accessing aged care services.

Hardship assistance for aged care – Fact sheet

Financial hardship assistance | My Aged Care

12.6.1. Veterans

The Australian Government recognises the aged care needs of the veteran community, in particular, mental health issues including post-traumatic stress. This is creating demand for a wider range of health care and support services in residential and home care services.

Assessors should establish links with relevant veterans' organisations in their communities and develop links between veterans and home care and residential care services. They should aim to facilitate an understanding of veterans' particular needs and to improve integrated care and access.

Assessors should have a good understanding of services provided by the Department of Veterans' Affairs (DVA) including the Veterans' Home Care (VHC) Program, the Coordinated Veterans' Care (CVC) Program and other mental health and rehabilitation programs.

Assessors should advise veterans that if they are an Australian former prisoner of war or Victoria Cross recipient, DVA will pay their basic fee and means tested care fee. They still may need to pay a means tested accommodation payment if their income and assets are above a certain limit. Services Australia will take into consideration DVA compensation payments when assessing a person's income and assets under the Support at Home program.

Optional learning for all assessors called 'Supporting older Australians, people with disability and Veterans' is available through MAClearning.

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Department of Veterans' Affairs website

12.7. People who are homeless or at risk of becoming homeless

Assessors have a responsibility to recognise older people who are experiencing, or are at risk of becoming homeless, and to ensure that they can access an assessment and any aged care services approved for them. Liaisons between assessors and support services for homeless people are particularly important for this cohort because of their extreme vulnerability. Assessments for this cohort will require a flexible and unique approach by assessment organisations. For example, assessors may need to travel to outreach locations in order to undertake the assessment, working closely with the providers already linked to

the older person, such as community health clinics, hospitals, emergency housing providers or other community services such as those that provide free meals and laundry services.

People aged 50-64 seeking aged care services under the homeless or at risk of homelessness criteria must meet the appropriate definition as described in Chapter 1.

Assessors should also be aware that homelessness alone is not grounds to approve an older person as eligible for residential or other forms of aged care. The person must meet the eligibility criteria set out in the *Aged Care Act 2024*.

Where housing assistance services are not available, assessors should make appropriate referrals and work with their state and territory government housing and homeless services.

Learning for all assessors called ‘Homelessness and older people’ is available through MAClearning.

For further detail on the definition of homelessness in aged care, see Chapter 1 ‘Homeless or At Risk of Homelessness Eligibility’.

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12.8. Care leavers

The department’s website provides information on care leavers, including a description of the term ‘care-leaver’.

This term refers to children who were in institutional and other out-of-home care prior to the year 2000, including:

- Forgotten Australians - people who spent a period of time as children in children's homes, orphanages, and other forms of out-of-home care prior to the year 2000.
- Former child migrants - children who arrived in Australia through historical child migration schemes and were subsequently placed in homes and orphanages.
- Stolen Generations - children of Aboriginal and Torres Strait Islander descent who were removed from their families and communities by federal and state government agencies from the late 1800s to the 1990s.

Assessors should be particularly sensitive to the effects of care-leavers’ childhood experiences with government officials, authorities and institutional care. These individuals may have experienced complex trauma and have general distrust of institutions and Government departments. Assessors should consider how to best support older people in the most sensitive and respectful way with an awareness and understanding of how childhood experiences may influence their concerns, preferences and decisions in relation to aged care, and emphasise that older people can have a support person at the assessment and that they are not obliged to take up any approved care.

In December 2016, the ‘Caring for Forgotten Australians, Former Child Migrants and Stolen Generations resource was launched. This package is designed to enhance aged care services and ensure residential and home care providers provide the best possible care to the care leaver groups. Additionally, the Real Care the Second Time Around Project has developed practical tips to assist aged care providers and staff to engage with Forgotten Australians/Care Leavers.

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Important:

Under Support at Home, individuals who are care leavers are eligible for a care management supplement which will be credited to their provider's care management account.

To identify individuals who are eligible for a care management supplement during the assessment, assessors must use the diversity fields in the IAT, which do not currently capture care leavers.

Assessors who have identified individuals who are care leavers during the assessment should select the diversity field 'a person separated from your parents or children by forced adoption or removal'.

This will ensure Services Australia is able to identify these individuals from the assessment and apply a care management supplement to their provider's care management account. Refer to the Support at Home Program Manual for more information on care management supplements.

Department of Health, Disability and Ageing website: Caring for Forgotten Australians, Former Child Migrants and Stolen Generations Information Package

Helping Hands website: Real Care the Second Time Around – Practical Tips

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12.9. Parents separated from their children by forced adoption or removal

This term refers to the policies and practices that resulted in forced adoptions and the removal of children throughout Australia, particularly during the mid-twentieth century.

Forced adoption practices impacted a large number of Australians and caused significant ongoing effects for many people, particularly mothers, fathers, and adoptees.

Assessors need to be particularly sensitive to those older people who have been adopted or impacted by past forced adoption practices, including interactions with government officials, authorities, and institutional care, as these experiences can have significant personal and psychological impacts. Assessors should emphasise that older people' wishes are taken into account, they can have a support person at the assessment, and they are not obliged to take up any approved care.

Department of Social Services website: Families and Children; Forced Adoption Practices and Forced Adoption Support Services

12.10. Lesbian, gay, bisexual, trans, intersex and other gender diverse people (LGBTI)

In Australia, the acronym 'LGBTI' refers collectively to people who are lesbian, gay, bisexual, trans and gender diverse, and/or intersex. LGBTI is often viewed as and referred to as single category that is used to speak about people using broad generalisations. However, LGBTI communities are not homogenous. Within the LGBTI acronym are several distinct, but sometimes overlapping, demographics each with their own histories, experiences and health needs.

Older LGBTI people and elders are likely to have experienced violence, stigma and discrimination throughout their lives. As a result, they may be reluctant to disclose their identities or histories to aged care services and therefore remain isolated or invisible within both the sector and the broader community. Combined with general stigmatisation and invisibility of LGBTI needs at large, this results in a lack of awareness of the unique needs of older LGBTI people, including a lack of targeted services to support them. In addition, the fear of mistreatment or rejection from aged care providers can lead to older LGBTI people delaying seeking care until their health deteriorates or a crisis occurs.

Assessors should ensure they conduct a non-judgmental assessment and the choice to disclose sexual orientation, sex/gender identity or variations of sex characteristics is entirely the older person's decision. Where an older person does disclose this information, the Assessor should emphasise that their information is protected information under the Aged Care Act 2024. In the case of transgender and intersex older people, where specific medical history may need to be communicated to service providers, it is important to discuss the way this information will be communicated or shared with providers.

Assessors should also be aware of service providers who provide LGBTI-specific services and those that are LGBTI inclusive and be prepared to advocate for LGBTI older people with other service providers as necessary as part of their care coordination activities.

In 2019, Actions Plans to Support LGBTI Elders were developed under the Aged Care Diversity Framework to address the unique needs and challenges faced by older LGBTI people. The provider action plan sets out what aged care providers can do to deliver inclusive care that is appropriate and sensitive to the needs of older LGBTI people. The consumer guide helps older LGBTI people to express their needs when speaking with aged care providers. It can also help people working in aged care to better understand the needs of LGBTI people.

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Department of Health, Disability and Ageing website:

Actions to Support LGBTI Elders: A Guide for Consumers

Actions to Support LGBTI Elders: A Guide for Aged Care Providers

Working with Diverse Groups in Aged Care

Federal Register of Legislation website: Aged Care Act 2024 - Federal Register of Legislation (see Statement of Principles section 25)

12.11. Other groups

12.11.1. Carers

It is important for assessors to recognise the valuable contribution and informal support that carers provide in the care of older Australians.

Where possible, with the older person's consent, the assessor should involve the older person's carer, family, registered supporters or other people who support the older person in the assessment and support planning process. In assessing the older person's care needs where family and carers are involved, assessors may find there is a need to balance the older person's concerns and preferences with those of their family and/or carers. Assuming the older person has capacity to make their own decisions, only the goals and preferences of the older person should be reflected in their Support Plan. The assessor may need to meet with the older person separately to ascertain the older person's preferences.

Assessors should (with the older person's consent) gain an understanding of the carer's support preferences for the older person and their capacity to continue in the caring role. Assessors need to consider the carer's circumstances and assess if there are any factors that may affect the sustainability of the caring role. An older person may agree to service recommendations that also benefit the carer, for example a type of respite service where there is an identified area of concern regarding strain in the older person/carer relationship and a goal to relieve stress on the carer.

Assessors should provide information to carers regarding specific support services that are available for carers to access in their own right and inform carers how to link with these support services such as Carer Gateway, the National Dementia Helpline and other carer-focused dementia supports delivered by Dementia Australia, Dementia Support Australia and consumer support and advocacy. Assessors can directly refer carers (with their consent) to Carer Gateway and the National Dementia Helpline through the Assessor Portal and Aged Care Assessor App.

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Carer Gateway website.

Department of Health, Disability and Ageing website: Our work related to dementia | Australian Government Department of Health, Disability and Ageing

My Aged Care – Assessor Portal User Guide 2 – Registering support people and adding relationships

Dementia Australia website.

Dementia Support Australia website.

12.11.2. People living with mental health conditions

When assessing the aged care needs of older people living with a mental health condition assessors are encouraged to liaise with mental health services to assist their understanding of the older person's needs. Assessors can also assist by facilitating links between the older person, providers, and appropriate mental health services.

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Aged care services usually do not have the capacity to adequately meet the needs of people with a serious, uncontrolled mental health condition without the support of, and treatment by, mental health services.

Assessment and approval for entry to aged care is only appropriate if the intensity, type, and model of care is the most appropriate to meet the person's care needs. This includes the following considerations:

- The person's mental health is stable. If they have recently received treatment, their mental health should be stable prior to being assessed although it is understood they may still have significant symptoms.

- Community mental health services will continue to provide collaborative care for those elderly people who have significant or unstable psychiatric symptoms.

The assessor must, prior to commencing an assessment, obtain informed consent for the assessment either from the person (if they have the capacity to do so), or an appointed decision maker consistent with state or territory arrangements who is able to make decisions regarding health, accommodation, and daily living care.

Involuntary mental health care is governed by separate mental health legislation in each state and territory. People who are placed under some form of an involuntary order (e.g., to manage their medicines when living in the community) may be eligible for aged care services. Assessors should consider each referral on a case-by-case basis.

In some jurisdictions, under certain circumstances, mental health legislation empowers the treating psychiatrist to make accommodation decisions in the best interests of a person receiving treatment under an involuntary order. This power is only exercised when a particular accommodation setting is required to facilitate the treatment of a person's mental health condition. It does not replace the need for guardianship when a mental health condition is incidental to that person's need for placement in residential care.

A comprehensive assessment is also required to access residential aged care facilities in jurisdictions where residential aged care facilities are part of the aged mental health service system.

All assessment organisations should develop assessment protocols that reflect relevant state or territory legislation and regulations, to ensure that older people living with a mental health condition are directed to the responsible agency to assess and recommend services most appropriate to meet their care and support needs.

12.11.3. People with palliative care needs

Under the Statement of Rights in section 23 of the Aged Care Act 2024 (the Act), an individual has a right to equitable access to palliative care and end-of-life care when required. The strengthened Aged Care Quality Standards also include outcome 5.7 Palliative Care and End-of-Life Care, that provides the intent for providers to follow, including recognising and addressing the needs, goals and preferences of individuals for palliative care and end-of-life care

Palliative care is person and family-centred treatment, care and support for people living with a life-limiting illness. Palliative care aims to improve quality of life and support people to live well for as long as possible.

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The Aged Care Quality and Safety Commission stipulate that care recipients are entitled to receive personal and/or clinical care that is appropriate and recognises their needs, goals, and preferences. This is particularly important for care recipients nearing the end of their lives whose preference may be to remain in their home for as long as possible.

Older people with a life-limiting condition can be supported by multiple care systems including, aged care services, mainstream health care services (including specialist care) and state and territory specialist palliative care services.

Where the aged care system is identified as part of the care requirements for a person over the age of 65 years (or over 50 years for Aboriginal and Torres Strait Islander people and people who are homeless or at risk of homelessness) with a life-limiting illness, it is important the aged care assessment is holistic and considers all of the person's needs. An important part of the aged care assessment will be the identification of palliative care and end of life care needs. Timely provision of appropriate care can support people to be cared for in their home for as long as possible if this is their preference. This is therefore important to consider as part of the assessment and when recommending care options and services.

Assessors should pay particular attention and use their professional judgement to note if an older person has a life limiting illness, they would likely benefit from receiving a palliative approach to care.

Supporting information

Palliative care seeks to prevent and relieve suffering through early identification and correct assessment and treatment of pain and other symptoms, associated with a life-limiting illness, whether physical, psychosocial, or spiritual. The types of supports that may be needed by an individual, their families and carers will vary and may include a range of clinical and non-clinical supports.

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Palliative care can occur in almost all settings where health and aged care is provided. It may be provided by a variety of professionals, including specialists, general practitioners, nurses, allied health workers, aged care workers, counsellors, and pastoral carers. The assistance of specialist palliative medicine physicians and nurses may be required when a person's symptoms are complex or difficult to manage.

Palliative care is different to 'end-of-life care'. While palliative care may be provided from the point of diagnosis of a life-limiting illness, end-of-life care is care for a person who is in the last months or weeks of life, including for those whose death is imminent (within weeks or days). The needs of patients are higher at this time and timely access to services is vital. Timely access to aged care services may depend on the services being sought and whether a person is already engaged with an aged care program.

It is therefore important to explore all options for an older person, including whether the Support at Home End-of-Life pathway is appropriate. Eligibility for the End-of-Life Pathway can be found in Chapter 6.

The provision of both palliative care and end-of-life care cuts across systems – care offered through the aged care system should be integrated to facilitate seamless transition, building upon clinical palliative care services offered by primary care professionals, or state-based specialist palliative care services.

For example, where a state or territory provides clinical palliative care services in the home, older people receiving palliative care may also require assistance with basic daily living support and supportive care to ensure they are able to remain at home for as long as

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possible. These care needs range from assistance with daily chores to personal care, providing meals, transport assistance, respite care, home modifications and social support.

Department of Health, Disability and Ageing website:

AN-ACC Class 1 – admit for palliative care

National Palliative Care Strategy

Training and tools for health and aged care professionals

The Australian Government funds accredited education and training on palliative care for the workforce.

The Palliative Aged Care Outcomes Program (PACOP) aims to systematically improve palliative and end-of-life care outcomes in aged care settings in Australia.

End of Life Directions for Aged Care (ELDAC) provides information, guidance, and resources for all aged care staff to support palliative care and advance care planning.

Information can be found at **health.gov.au/palliative-care-education**

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12.11.4. Older people who are in prison

Usually, aged care assessments will be conducted when the person is released from prison into the community by referral through My Aged Care. Assessments of ex-prisoners in a community setting will depend on the person's needs and the screening and triage outcome. However, in a prison setting, only clinical assessors can undertake such assessments. A triage delegate can only arrange an assessment by a non-clinical assessor to take place after the person is released.

If it is imperative that an assessment occurs in prison, the clinical assessor can conduct an in-prison assessment, provided the prisoner has a release date and the prison is agreeable to the arrangement. By exception, an older person may be assessed in a prison setting by a clinical assessor prior to them securing a release date. This can only occur in cases where a release date is dependent on a needs assessment being undertaken.

In recognition that prisoners can have very complex health and care needs, it is appropriate for a clinical assessor to be supported by another assessor. This is a decision for the assessment organisation to make keeping in mind the health and safety of its assessors. For additional considerations for WHS screen prior to assessment see Chapter 5.

Regardless of whether the assessment occurs in a community or prison setting, Commonwealth subsidised aged care services can only commence after the prisoner is released. It is the responsibility of the relevant state or territory government to provide the appropriate care and services while the person is incarcerated. If the older person is found eligible for Support at Home, the assessor should update the older person's status to 'not

seeking services' at the time of assessment. Upon receiving a prison release date, the older person or registered supporter or other person who support the older person will need to contact My Aged Care to indicate they are actively seeking care to be placed on the Support at Home priority system.

If the person shares (or the assessor is in receipt of) sensitive information, with the older person's consent this can be recorded by adding a sensitive note and/or a sensitive attachment. Providers will be presented with a banner message on My Aged Care where a sensitive note exists prompting them to contact the assessor. The assessor should disclose information where it is applicable to the provider in their provision of care or services to the older person (see Recording sensitive information in Chapter 5). Where it is recorded the older person has challenging behaviours that may impact the safety and welfare of the older person or staff, the assessor should contact the provider to help ensure they can appropriately manage these behaviours once services commence.

The Support Considerations section of the IAT gives assessors the opportunity to ask the older person if there is any further information providers should be aware of in the delivery of care and services. This will allow (although this is up to the older person to agree to) the older person to advise of parole conditions or any implications of their incarceration that relate to effective and safe aged care provision that have not previously been raised during the assessment. The assessor can record this information as a sensitive note and/or sensitive attachment and should add a note in the Support Considerations section of the IAT (and only if appropriate, the Support Plan) indicating that there is a sensitive note and/or sensitive attachment to view.

Assessors should be mindful that there is an increased likelihood that prisoners or ex-prisoners are at risk of vulnerability and complexity and requiring additional linking support (see Delivering Linking Support / Care Coordination to Vulnerable Older people in Chapter 5).

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13. Chapter 13: Operating procedures

What you'll find in this chapter

This chapter includes information on privacy, information management and relevant legislation. Also included in this chapter is information about:

- Applying to be delegate
- Information management
- Clinical governance
- Branding
- Resources for consumers
- Reporting and performance

13.1. Applying to be a delegate

Delegate applications are submitted online within the My Aged Care assessor portal.

13.1.1. Delegate on/off form

To become a delegate position, such as a Triage Delegate or Clinical Assessment Delegate and gain the authority to make approval decisions, individuals must complete an application process and be approved by the Department of Health, Disability and Aged Care (the Department). This application is submitted through the My Aged Care assessor portal.

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Within the portal, the Delegate on/off form can be used to:

- **Add** users to delegate positions.
- **Cease** existing delegates from delegate positions.
- **Replace** existing delegates noting that the replace functionality will cease existing delegate access and add their replacement in a single step.

A number of rules apply:

- Only assessors, Team Leaders, and delegates can hold delegate positions.
- To apply on behalf of someone else, the applicant must be either a Team Leader or an Assessment Organisation Operational Manager.
- Team Leaders can submit applications for themselves as well as for others.
- Assessment Organisation Operational Managers can only hold a delegate position if they are also an assessor or a Team Leader.

Note: There is no requirement to use the Delegate on/off form to become a non-clinical Delegate until 1 July 2026 when system functionality is turned on. All non-clinical assessors will have a blanket delegation under the Instrument of Delegation to approve CHSP, CHSP AT, CHSP HM. In practice, even though there is a blanket delegation assessment organisations can instruct their workforce to get someone else to approve a client's home support assessment.

All approved delegates are assigned a unique Delegate ID in the My Aged Care system. This ID consists of a 6-character code, where:

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- The first three characters represent the assessment organisation ID
- The fourth character indicates the profession ID
- The final two characters identify the specific position within the organisation.

Delegate ID Position setup

The Delegate Position framework derives the position name (Delegate ID Position) for all delegate roles as the concatenation of: 'Initials of delegate role + delegate team ID + profession code + position number'

Initials of delegate role

Table 57. Initials of Delegate Roles

Delegate Role	Initials of Delegate Role
Triage Delegate	TD
Clinical Assessment Delegate	blank (no value)
Non-Clinical Assessment Delegate	NCAD

Delegate team ID

The delegate team ID is an existing field and is unique to an outlet.

Profession code

Table 58. Profession codes

Profession	Profession Code
Non-Clinical	0
Medical Practitioner	1
Registered Nurse	2
Social Worker	3
Occupational Therapist	4
Physiotherapist	5
Other Health Professional	6
Psychologist	7

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Position number

The position number is a counter, automatically incremented.

Example:

A Triage Delegate role for an outlet with:

- Delegate Team ID: "7YC"
- Profession: Social Worker (Profession Code: "3")
- Position Number: "00"

The Delegate Position ID will be TD7YC300.

A Clinical Assessment Delegate position (ID: 6SR315) is located in Southern Tasmania (Aged Care Planning Region) for the Tasmanian Department of Health. This role:

- Can only be occupied by a Social Worker
- Is identified by the Position Number: 15 in that outlet.

Using the My Aged Care assessor portal

The My Aged Care assessor portal allows applicants to manage delegate positions through a structured process.

The delegate application process consists of four main steps:

- Create the application – The applicant initiates and submits the application.
- Verify the application – A verifier, who must hold the Team Leader role in the portal, reviews and confirms the application details.
- Support the application – A supporter, who must hold the Assessment Organisation Operational Manager role in the portal, provides the final approval or endorsement.
- Approve the application – The Department reviews the application and any supporting evidence before deciding to approve or deny it.

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Each step in the application process must be completed in order, following the system's established rules and workflows.

Portal processes

A key requirement is that applications progress one step at a time. For instance, if a Team Leader submits an application on behalf of another user, they must first create and submit the application. Only after submission can they return to verify it. This structured approach ensures clarity and organisation throughout the process.

Applicants, verifiers, and supporters have access to the proposed delegate's profile details, including their name, contact information, clinical status, occupation, and qualifications. However, these details cannot be updated during the application process. If any information needs to be changed, the applicant must work with the outlet or organisation administrator to update the details within the portal, separately from the application process.

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Access to applications is limited to authorised users

Outlet-level Team Leaders and Outlet Administrators have limited access. For applications involving multiple outlets, only Team Leaders overseeing all included outlets can view them. Outlet Administrators have similar restrictions and, like Organisational Administrators, do not participate in processing delegate applications.

Creating a delegate application

When creating a delegate application, delegate positions can be managed by adding, replacing, or ceasing delegates.

- The **Add** option allows the user to create a new delegate position.
- The **Replace** option lets the user cease an existing delegate and assign their replacement.
- The **Cease** option is used to remove a delegate from their positions without assigning a replacement.

Each application must focus on a single delegate role, which must be selected at the time of submission. The available roles are Triage Delegate, Clinical Assessment Delegate, or Non-Clinical Assessment Delegate.

If someone is required to hold multiple roles, separate applications must be submitted for each role. In replace applications, the new delegate automatically inherits the same role as the ceasing delegate.

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Important to note

- For Add and Replace applications, selecting the delegate's profession is a key step. The system uses this information to either assign an existing vacant position for that profession or create a new position if no vacancy exists. For Cease applications, there is no need to select a profession. Simply choose one or more positions the delegate currently holds to proceed with their cessation, regardless of their profession.
- Applicants can include start and end dates in their applications. The Date From field specifies when the delegate will begin their role, while the Date To field is used to automate the delegate's dissociation when their term ends. However, the Date To field is not needed for ceasing a delegate, as both temporary and permanent cessations are treated the same by the system.
- As part of the process, applicants must nominate a Team Leader to verify the application and an Assessment Organisation Operational Manager to support it. The system filters the list of eligible Team Leaders to include only those who cover all outlets involved in the application. If no suitable Team Leader is available, the system will display an error message. The Operational Manager must also be selected from the provided list to ensure their role matches the application's requirements.
- Special rules apply when a Team Leader submits their own application. In such cases, they must nominate another Team Leader to verify it. Once submitted, the nominated verifier will handle the next steps.

- The system automatically checks several details during the application process, including the proposed delegate's clinical status, occupation, qualifications, and training. If the delegate does not meet the criteria, warning messages will guide the applicant to update the delegate's user profile or adjust their position type or profession. Applicants can still proceed by acknowledging these issues, and this acknowledgment will be visible to the verifier and supporter in the next stages. Some issues, however, are considered hard stops. For example, if the delegate lacks a clinical status or is assigned a role incompatible with their profile, the application cannot proceed until their user profile is updated.

Note:

The department's My Aged Care Capability Section verifies each application to ensure all required training has been completed.

For details on mandatory training requirements for each position, please refer to the My Aged Care Workforce Learning Strategy.

- Supporting documentation to be uploaded with the application could include MAC learning training transcripts, qualifications, AHPRA registration evidence etc.
- Once the application has been submitted, a confirmation banner will appear confirming that the application has been created and submitted to the verifier for action.

My Aged Care Workforce Learning Strategy.

Assessor Portal User Guide 12 – Managing Delegate Roles

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13.2. Information management

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13.2.1. Privacy and Protected Information under the Aged Care Act 2024 (Cth)

Sections 537 to 541 of the *Aged Care Act 2024* (the Act) specifies the purposes for which information can be used or disclosed in accordance with the Act. The collection of information from an older person, their registered supporter(s) and/or appointed decision maker/s for the purposes of determining an individual's eligibility and assessing their access to funded aged care services is authorised by the Act.

Personal information collected during the assessment process is considered protected information. Protected information is defined under section 21 of the Act, as personal information or information, including commercially sensitive information, where the disclosure of which could reasonably be expected to found an action by an entity (other than the Commonwealth) for breach of a duty of confidence. Personal information has the same meaning as in the Privacy Act 1988 (Privacy Act) and is defined as information or an opinion about an identified individual, or an individual who is reasonably identifiable:

- Whether the information is true or not; and

- Whether the information or opinion is recorded in a material form or not.

Sensitive information (within the meaning of the Privacy Act may be personal information. Information is not personal information if it is only about a person who has died.

Additionally, information collected during the assessment process may also be considered sensitive information as defined by section 6 of the Privacy Act which includes information about an individual's identity and health. Sensitive information is afforded additional protection under the Australian Privacy Principles (APP) and should only be used for authorised purposes (see information below about assessment organisations who may be APP entities.

The Aged Care Act 2024 (the Act) imposes strict rules on the management of protected information, stating that a person commits an offence if they make a record of, disclose, or otherwise use protected information that was acquired in the course of performing duties or exercising powers or functions under the Act or the *Aged Care (Transitional Provisions) Act 2024,* where the use or disclosure is not authorised under Division 2 of Part 2 of Chapter 7 of the Act. The maximum penalty for such an offence is imprisonment for up to two years or a fine of 120 penalty units, or both.

To comply with these requirements, individuals and entities who handle assessment information must implement stringent confidentiality measures. This includes secure handling, recording, and storage practices to ensure that the information is safeguarded against unauthorised access or disclosure.

To ensure the proper handling and disclosure of protected information in accordance with the law, assessment organisation staff must follow their organisation's standard operating procedures and guidance in this manual.

Assessment organisations who are APP entities under the Privacy Act will also need to comply with the requirements of the Privacy Act in handling personal information. Where personal information is used or disclosed in accordance with an authorisation in Division 2, Part 2, Chapter 7 of the *Aged Care Act 2024* this will be permitted under the *Privacy Act* (see APP 6.2(b)).

Assessment organisations should consult the Privacy Act and APP Guidelines for further information on the definition of APP entities and its applicability to their organisation.

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13.2.2. Collection and protection of information

The collection of information about an older person and their support network as part of the assessment process must comply with the legislative requirements under the Aged Care Act 2024 and Privacy Act 1988 (the Privacy Act). Where applicable assessors must seek and gain informed consent using the My Aged Care Assessment Consent Form (the Consent Form) including reading the consent scripts to the older person or their appointed decision maker (whether or not they are a registered supporter).

Any information collected for the purpose of determining an individual's eligibility and need for Commonwealth-subsidised aged care is collected on behalf of the Commonwealth and is therefore Commonwealth property. This includes any notes, documents or other materials created for the purpose of preparing an older person's record.

The Privacy Act contains further provisions to protect information which applies to assessment organisations.

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Where the Privacy Act applies, it is critical that assessment organisations have systems, protocols and processes in place to ensure the safety of older people's records from loss, interference, misuse, unauthorised access, modification or disclosure. This requirement relates to Australian Privacy Principle 11. Penalties may apply to agencies and individuals for breaches of the Privacy Act. Assessment organisations may refer to the Office of the Australian Information Commission for further information on the handling of personal information and the consequences of misuse.

If a record of an assessment is a state or territory government as well as being a Commonwealth record, there may be further requirements to retain and store information under state or territory legislation. Assessment organisations should seek advice from their state or territory government on any state or territory requirements. Assessment organisations must meet all requirements at both levels of government.

All assessment organisation staff should exercise caution and care when handling personal information. If an assessment organisation staff member becomes aware of a potential privacy breach they must discuss this with their assessment organisation manager and follow their organisation's procedures.

13.2.3. Use, storage and retention of information

Records are now created, stored and managed electronically in the My Aged Care portal. In some circumstances, it may be necessary for records to be created in a hard copy paper format (e.g., the Emergency Residential Care - Application for Care form). In these cases, the paper records are to be uploaded to the My Aged Care portal as soon as possible and the paper copy destroyed in accordance with the destruction guidelines (see Destruction below).

Should you require information about the management of legacy records, those records that were created prior to the My Aged Care Gateway please contact your assessment organisation manager who can liaise with the department if necessary for further advice.

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13.2.4. Destruction of information

The destruction of new paper records should be undertaken as soon as the record has been captured digitally in the My Aged Care portal, and a true electronic copy has been confirmed. Destruction can be undertaken using class B paper shredders that shred to P-5 security level. Level P-5 provides more security with cross-cut shreds that are only ≤ 30 mm² particles with width ≤ 2 mm.

Alternatively, destruction can also be through a Protective Security Policy Framework endorsed T4 accredited waste management agency.

The destruction of electronic records requires the deletion of all copies of the record from any system in such a way that it is impossible to restore the record. For records that are destroyed and not uploaded to My Aged Care, assessment organisations must also maintain evidence of identifying what has been destroyed and the means of destruction.

Department of Home Affairs website: Protective Security Policy Framework

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13.2.5. Use and disclosure of information

Assessors and other staff must be aware that information they acquire or generate in the course of performing their delegated functions or powers under the Aged Care Act 2024 (the Act) may not be recorded or disclosed or otherwise used unless it is in accordance with the Act. Generally, information can be used or disclosed by assessors and staff in the course of performing their delegated powers or functions under the Act or with the consent of the older person. Written records of 'interesting cases' may not be kept by staff members, and cases may not be referenced in public discussion such as in a Letter to the Editor or in social media. There are explicit authorisations for the use and disclosure of information under the Act. These may generally be categorised as:

- **general authorisations**- including but not limited to functions and powers under the Act, for proceedings, with consent, preventing serious threat to safety, health or wellbeing, for the purposes of worker screening
- **entrusted persons** – disclosure to a minister, disclosure for the purposes of obtaining legal advice or another legal service, for the provision of services to an individual (but only for specific purposes, such as assessing the level of care an individual needs, relative to the needs of others)
- **authorisation by the System Governor or Appointed Commissioner** – disclosure to relevant Commonwealth bodies and agencies, disclosure to a registered supporter of an individual accessing or seeking access to funded aged care, disclosure for continuation of funded aged care services, disclosure for research, disclosure for law enforcement and revenue protection, disclosure for maintenance of professional standards, disclosure for certified purposes
- **authorisation by the System Governor or Appointed Commissioner for certain inquiries**- disclosure to the coroner, disclosure for state or territory complaints
- **Authorisation by the System Governor for grants and quality purposes**- disclosure for grants and disclosure for star ratings

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Disclosures made under any of the authorisations must be in accordance with the specific requirements outlined under Division 2 of Part 2 of Chapter 7 of the Aged Care Act 2024 (the Act).

Any systems developed for the collection and analysis of data should incorporate adequate procedures to protect the privacy of people being assessed. If data is to be used for purposes other than assessment, or individual care planning, assessors must have procedures in place to ensure that older person confidentiality is maintained and individuals cannot be identified.

Older people and their registered supporters should be encouraged to access their My Aged Care online account. This gives direct access to the older person's assessment information, which they can disclose to other parties as they wish.

In cases where there is no consent to release information or any doubt about the release of information, the assessor should discuss this situation with the organisation's manager. The manager may further consult the assessment organisation's auspice organisation, the state or territory government, the department or obtain independent legal advice if any doubt remains, before releasing information.

Australian Security Intelligence Organisation website: ASIO T4 Protective Security

Federal Register of Legislation website: Aged Care Act 2024 - Federal Register of Legislation

Archives Act 1983

Electronic Transaction Act 1999 (see Part2, Division 2, Section 12 – Retention)

Privacy Act 1988 - Federal Register of Legislation

National Archives of Australia website: Records Authority 2011/00396196 Department of Health and Ageing (includes Aged Care)

Office of the Australian Information Commissioner website:

Australian Privacy Principles

13.2.6. Freedom of information

The Commonwealth *Freedom of Information Act 1982* (Freedom of Information Act) gives members of the public the right to request access to government-held information. This includes information the government holds about individuals or about government policies and decisions. The Freedom of Information Act extends, as far as possible, the right of the Australian community to access information (generally documents) in the possession of the Commonwealth, limited only by considerations of the protection of essential public interest and of the private and business affairs of persons in respect of whom information is collected and held by departments and public authorities.

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Federal Register of Legislation website: Freedom of Information Act 1982

Office of the Australian Information Commissioner: What is freedom of information? | OAIC

13.2.7. Framework for Governance of Indigenous Data

The Framework for Governance of Indigenous Data provides a stepping stone towards greater awareness and acceptance by Australian Government agencies of the principles of Indigenous Data Sovereignty.

The Indigenous Data Sovereignty Principles are outlined by the Maiam nayri Wingara Indigenous Data Sovereignty Collective. The principles concern the right of Aboriginal and Torres Strait Islander people to exercise ownership and control over Indigenous data at all phases of the data lifecycle. Indigenous data is defined by Maiam nayri Wingara as 'information or knowledge, in any format or medium, which is about and may affect Indigenous peoples both collectively and individually.'

The framework contains the following guidelines for Australian Government agencies to change data governance practices, in alignment with the commitments made in the National Agreement on Closing the Gap:

- **Partner with Aboriginal and Torres Strait Islander people-** establishing formal partnerships and shared decision-making with Aboriginal and Torres Strait Islander people, embedding Indigenous leadership into data governance.

- **Build data-related capabilities-** Supplementing of technical skills with understanding of the ways in which Indigenous data has been collected and the narratives and challenges which arise from current datasets. Supporting Aboriginal and Torres Strait Islander communities and organisations through training and up-skilling Indigenous people.

- **Provide knowledge of data assets-** Supporting Aboriginal and Torres Strait Islander people to locate and access relevant government held data by informing Indigenous people about what data is held by the government, its usage and access permissions.

- **Build an inclusive data system-** The structural transformation of datasets to support the inclusion of Aboriginal and Torres Strait Islander people in data governance.

https://www.oaic.gov.au/privacy/the-privacy-act/Framework for Governance of Indigenous Data

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13.3. Clinical governance

Assessment organisations have a responsibility to implement effective clinical governance, made operational through a clinical governance framework. A clinical governance framework is a framework that describes an organisation's approach to clinical governance. It must include the practical, clinical supports that are in place for staff who may need to exercise clinical judgement or undertake elements of an aged care needs assessment that are clinical in nature.

Appendix D provides guidance on how to implement effective clinical governance.

13.4. Separation of assessment services and delivery of aged care services

An assessment organisation delivers the assessment of older person needs independent of provider preferences, and ensures older people are referred only to the services that will fulfil their needs and goals.

It is a requirement for assessment organisations to contractually have operational separation of assessment services from service delivery (where applicable) for all contracted assessment organisations and any relevant sub-contractors (including consortiums).

Assessment organisations that deliver both assessment services and service delivery must ensure there is a clear separation of service, particularly in the facilitation and management of assessments and referrals to aged care services. Assessment organisations must have policies and procedures in place to assure the separation of assessment from service delivery.

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Assessment organisations must seek prior approval from the Department of Health, Disability and Ageing (the department) before engaging or using assessment organisations and any relevant sub-contractors to provide aged care services.

13.5. Branding

Assessment organisations that are contracted to (or in an agreement with) the Australian Government (under the oversight of the department) are required to comply with branding guidance that is included in the following style guides:

- Ensure all materials produced adhere to the Australian Government Branding Guidelines.
- Ensure all web-based content complies with the relevant Digital Service Standards including Requirements for Australian Government websites and comply with the Web Content Accessibility Guidelines (WCAG) version 2.2 AA for all government websites.

Subcontractors are required to consult with their primary contractor on branding requests.

- **Department of Prime Minister and Cabinet website:** Australian Government Branding Guidelines | PM&C
- Digital Service Standards Web Content Accessibility Guidelines (WCAG) 2.2

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13.6. Aged care resources for older people

Hard copies of My Aged Care resources including booklets, brochures, posters and magnets are available from National Mailing and Marketing by emailing: health@nationalmailing.com.au or calling (02) 6269 1025.

Information and resources about aged care can be found on the My Aged Care website. Recommended information and resources include:

- *Exploring aged care* booklet for older people, their families and carers:
- Signing up to receive the EngAged, our monthly newsletter on aged care and ageing well:
- Following the Council of Elders on Facebook and keep up with the work they are doing. Find out what the Department of Health, Disability and Ageing is doing to help people in Australia age well:
  -

Resources | My Aged Care

Exploring aged care booklet

EngAged newsletter: health.gov.au/aged-care-newsletter-subscribe

facebook.com/groups/AgedCareCouncilOfElders

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health.gov.au/topics/positive-ageing-is-ageing-well

13.7. Reporting and performance

Assessment organisations are expected to meet measures on timeliness and performance according to their contractual agreements with the Australian Government.

The department makes available various business intelligence (BI) and management reports which support assessment organisations in monitoring and managing their performance against agreed KPIs and other measures. These reports will progressively become available during the establishment of the Single Assessment System workforce. Assessment Organisations can access Qlik reports on the Health Data Portal, reports currently available include:

- SAW001: Referral and Assessment Volumes
- SAW 002: Timeliness
- SAW003: Outstanding Assessments
- SAW005: Organisation Performance
- SAW006: Recommended Services
- SAW007: Service Referrals
- SAW008: Home Care Package Approvals
- SAW 009: Referral Data Breakdown
- SAW010: Assessment Data Breakdown

As further reports become available, they will be communicated to Assessment Organisations and listed above. For queries regarding the Single Assessment System Qlik reports, support documentation or assistance with access to the Health Data Portal, please contact AgedCare.Assessment.Reporting@health.gov.au

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14. Chapter 14 – Fees and payments

What you'll find in this chapter:

This chapter provides guidance on:

- fees,
- payments, and
- participant contributions for funded aged care services.

All sections in this chapter are new content.

14.1. An assessor's role in advising clients about fees and payments

It is important that older people understand the potential costs of care early in their interaction with the aged care system.

Assessors are not responsible for providing detailed financial information about the fees or charges that an older person may be charged to access aged care services, but they do have a role in advising older people about where they can access the information they need and what the process may entail. They should be able to assist clients to access appropriate support should an older person be experiencing financial disadvantage (see section 14.2.4Financial Hardship).

Ideally, clients should be referred to the My Aged Care website and the contact centre for information regarding care costs and fees prior to the face-to-face assessment. This gives the client time to consider the information prior to the assessment.

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Note:

After the assessment, rather than the assessor handing out Services Australia hard copy forms to the client (which may lead the client to complete a form unnecessarily), assessors can leave booklets specific to their service recommendations which contain necessary fee information for that program or type of care.

Assessors may wish to point out the section of the booklet which provides information about fees, who to contact about whether they need to complete a form and how to access the forms if required (see Chapter 13).

14.2. Aged care program fees

14.2.1. Fees for Commonwealth Home Support Program (CHSP)

A provider delivering funded aged care services through a service group under the CHSP may charge an individual an amount for or in connection with those services (the CHSP contribution), in accordance with section 286 of the Aged Care Act 2024. Providers must have a publicly available financial hardship policy that covers how clients can apply for a waiver or reduction of the CHSP contribution.

The CHSP contribution must be agreed with the client in writing, including how and when it is to be paid and outlined in the client's Service Agreement. In agreeing to the amount of CHSP contribution, providers should consider a range of factors including:

- business costs associated with delivering the service
- affordability for CHSP clients
- the socioeconomic circumstances of those receiving services.

There is no formal means testing for CHSP client contributions. The client contribution fee may vary from person to person. This is because the fee can vary depending on the specific services a client receives and their individual capacity to pay. Two clients of a similar age with similar support needs may pay different CHSP contributions for a similar service.

The National CHSP Client Contribution Framework outlines the principles that service providers can adopt in setting their client contribution policies with a view to ensuring that those who can afford to contribute to the cost of their care do so whilst protecting those most vulnerable.

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Commonwealth Home Support Program (CHSP) 2025–27 Manual (from 1 November 2025) | Australian Government Department of Health, Disability and Ageing

Commonwealth Home Support Program (CHSP) resources

14.2.2. Fees for Support at Home participants

The introduction of contributions in the Support at Home Program have replaced existing fee arrangements under the Home Care Package Program.

With the transition from the Home Care Package program to Support at Home, changes have been made to how participant contributions are calculated. This information is applicable for older people accessing services under the Support at Home Program, including through the Restorative Care Pathway, End-of-Life Pathway and Assistive Technology and Home Modifications (AT-HM) scheme.

For Support at Home participants, an income and assets assessment by Services Australia determines participant contributions. Contributions will be different for each participant

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based on the type of service received, the outcome of their income and assets assessment and their pension status.

- Clinical support services will attract no contribution fees as they are fully funded by the government for all participants.
- Independence services such as personal care will attract moderate contributions.
- Everyday living services such as cleaning and gardening will attract the highest contributions.

For full or part pensioners, Services Australia will use the information on a person's income and assets assessment that has been provide for their pension assessment to determine their Support at Home contributions. Non-pensioners, once approved for Support at Home will need to complete an income and assets assessment if Services Australia does not already have their financial details.

Completing an income and assets assessment is not mandatory, however, Support at Home participants who choose not to complete one can be asked to pay the maximum participant contribution rate.

Providers do not need to wait for an income assessment to be completed before an older person commences Support at Home services. Service providers and participants can agree on a temporary contribution rate while a new participant's income and assets are being assessed by Services Australia. The Support at Home fee estimator, available on the department's website can be used to assist in determining these temporary rates.

A no worse off principle applies for grandfathered Home Care Package care recipients who, on or before 12 September 2024, were either receiving a Home Care Package, on the National Priority System or assessed as eligible for a package. The no worse off principle applies to financial contributions. These participants will make the same contributions, or lower, than they were assessed as having to pay under Home Care Package Program arrangements, even if they are reassessed into a higher Support at Home classification at a later date. The same lifetime cap will also be honoured for this cohort (approximately $85,000).

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For Support at Home Participants there are defined circumstances when they may simultaneously access CHSP services. When doing so, a Support at Home participant must pay regular CHSP client contribution fees. These client contribution rates are subject to government subsidisation. The Support at Home participant will need to fund the client contribution fees themselves and cannot use their Support at Home funding allocation. This arrangement is applicable in the following circumstances:

- Pre-existing CHP social support group
- Hoarding and Squalor
- Short-term respite
- Emergency access

For further information about the circumstances when a Support at Home Participant can simultaneously access CHSP services, refer to Chapter 6.

If required, Support at Home Participants can choose to pay for additional CHSP services out of their Support at Home budget. As the Support at Home participant is already receiving government subsidised aged care services, additional CHSP services will be charged at the full cost and not subject to further subsidisation.

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Restorative Care Pathway

Participant contributions apply for services delivered in the independence and everyday living categories. Services in the clinical support category do not require participant contributions and are fully funded by the government.

ATHM Scheme

Support at Home participants may be required to make contributions for AT-HM items and services. AT-HM items attract a contribution rate equivalent to the independence category. Prescriptions and wrap-around services fall under the clinical supports category, requiring no participant contribution.

End-of-Life Pathway

Consistent with ongoing Support at Home, participant contribution arrangements apply for independence and everyday living services accessed under the End-of-Life Pathway. For services in the clinical supports category, no participant contribution is required as these services are fully funded by the government.

Further information is available on the Department of Health, Disability and Ageing website:

- Support at Home Participant contributions
- Support at Home Program Manual
- Schedule of Fees and Charges for Residential and Home Care

My Aged Care Website:

- Aged Care Resources
- Fact Sheet: Support at Home program - participant contributions

Services Australia website:

- Providing home care
- Providing residential care

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14.2.3. Older people entering permanent residential care

How much a person pays for their residential aged care is based on their income and assets. Services Australia or the Department of Veterans' Affairs (DVA) assesses income and assets, and this is known as an aged care means assessment. If an older person is a member of a couple, they will be assessed on half of their combined income and assets. Residents who have had their means assessed are required to report changes to their financial circumstances to Services Australia or DVA within 28 days to help keep their fees correct.

People who can't afford to make a higher contribution will only pay the basic daily fee. Those who can afford to will contribute more to their aged care costs.

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If an older person chooses not to have their means assessed, they will not be eligible for assistance with care and accommodation costs.

If a person moves into an aged care home for permanent residential care, they will pay fees under one of 2 arrangements:

- **1 July 2014 fee arrangements:** these apply for people who were approved for or accessing a Home Care Package on 12 September 2024, and who are therefore protected by the 'no worse off principle" and will pay fees under the 1 July 2014 arrangements.
- **1 November 2025 fee arrangements:** these apply to people who first enter residential care on or after 1 November 2025.

1 July 2014 fee arrangements

Residents under these arrangements will not be affected by the changes to means assessments under the *Aged Care Act 2024*.

Before entering into permanent residential care, an older person should have their means assessed to see if they're eligible for Australian Government assistance with fees and accommodation costs. The fees they pay will depend on the outcome of their means assessment and what they agree on with their aged care provider. Residents can also submit an *Aged care calculation of your cost of care form* after entering aged care.

All fees must be clearly written in the resident or service agreement, accommodation agreement and the optional higher everyday living agreement.

An older person may need to pay some or all of these fees:

- basic daily fee
- means tested care fee
- accommodation costs
- fees for optional services.

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Understanding fees for aged care homes – 1 July 2014 fee arrangements | Australian Government Department of Health, Disability and Ageing

Means assessment for residential aged care | Australian Government Department of Health, Disability and Ageing

1 November 2025 fee arrangements

Residents who enter care after 1 November 2025 will be affected by means assessment changes under the Aged Care Act 2024. These include:

- new income and asset limits will determine the new means tested fees
- the hotelling supplement will be means tested rather than paid in full by the government, and some residents will contribute to it with a hotelling contribution
- some residents will pay a new means tested non-clinical care contribution with daily and lifetime caps.

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Before entering permanent residential care, an older person should have their means assessed to see if they're eligible for Australian Government assistance with fees and accommodation costs. The fees they pay will depend on the outcome of their means assessment and what they agree on with their aged care provider. Residents can also submit an *Aged care calculation of your cost of care form* after entering aged care.

All fees must be clearly written in the service agreement with the provider, accommodation agreement and the optional higher everyday living agreement. These fees may change over time during the time of an older person's care.

Older people may need to pay some or all of these fees:

- basic daily fee
- hotelling contribution
- non-clinical care contribution
- accommodation costs
- higher everyday living fee.

Understanding fees for aged care homes – 1 November 2025 fee arrangements | Australian Government Department of Health, Disability and Ageing

Means assessment for residential aged care | Australian Government Department of Health, Disability and Ageing

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14.2.4. Financial hardship

From 1 November, financial hardship arrangements will continue to be available if an older person can't afford to contribute to the cost of their aged care, both in residential care and in-home care. An older person will be assessed on their specific circumstances. If approved for hardship assistance, the Australian Government will pay some (or all) of their aged care fees. The government will pay any approved amounts to the aged care provider on the older person's behalf. If an older person is required to pay some of their fees, they will continue to pay those to their provider.

To apply for financial hardship assistance, an older person must meet certain requirements and complete the Aged Care Claim for Financial Hardship Assistance form. This form is sent to Services Australia to assess the application and they will let the older person know in writing of their decision and what assistance they are eligible for. This form should be submitted by an older person once they start accessing aged care services.

Hardship assistance for aged care – Fact sheet

Financial hardship assistance | My Aged Care

14.2.5. Fees payable by older people receiving transition care

Registered providers may ask individuals to pay a care fee as a contribution to the cost of their care. Any fees must be fully explained to the individual and the amount charged forms part of the service agreement between the individual and registered provider.

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The maximum amount that can be charged as per section 286-10 of the *Aged Care Rules 2025* is:

- if Transition Care Program (TCP) is delivered through the residential care service group —the amount obtained by rounding down to the nearest cent the amount equal to 85% of the basic age pension amount (worked out on a per day basis); or
- if TCP is delivered in a community/home setting and is delivered through the home support, or assistive technology service groups — the amount obtained by rounding down to the nearest cent the amount equal to 17.5% of the basic age pension amount (worked out on a per day basis).

An individual's access to transition care should not be affected by their ability to pay fees but should be decided based on their need for care and the capacity of the registered provider to meet that need. Decisions on whether to charge fees are entirely at the discretion of each State and Territory. The Australian Government recommends that fees be waived for financially disadvantaged individuals. Information on the cost of transition care for individuals is outlined on the My Aged Care website.

Transition care | My Aged Care

Transition Care Program Guidelines – November 2025 | Australian Government Department of Health, Disability and Ageing

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14.2.6. Non-Australian residents

Non-Australian residents are not excluded from entitlements under the *Aged Care 2024* (the Act) and Visa holders do not require a Medicare Card in order to access an assessment.

Under the Act, non-Australian residents may be eligible for Government assistance with their aged care costs, if the person has been approved by an assessor and has had their income (for home care) or means (for residential care) assessed by Services Australia.

While the Australian Government is the majority funder of aged care, beyond this support it is expected that people will use their income and/or assets, depending on their care type, to contribute to the costs of their care, where they can afford to do so. The amount that the person can be asked to contribute will be assessed by Services Australia under the same rules as any other aged care recipient.

In the event that a non-Australian resident client requests advice from an assessor regarding what fees and payments they may be required to contribute towards their home care or residential care services, they should be advised to complete an income or means assessment to determine their contribution. This applies for all clients who wish to receive Government assistance with the cost of their care, regardless of residency status.

Income and means assessment

:

APPENDIX A – Overview of changes in the assessment process from the commencement of the Aged Care Act 2024

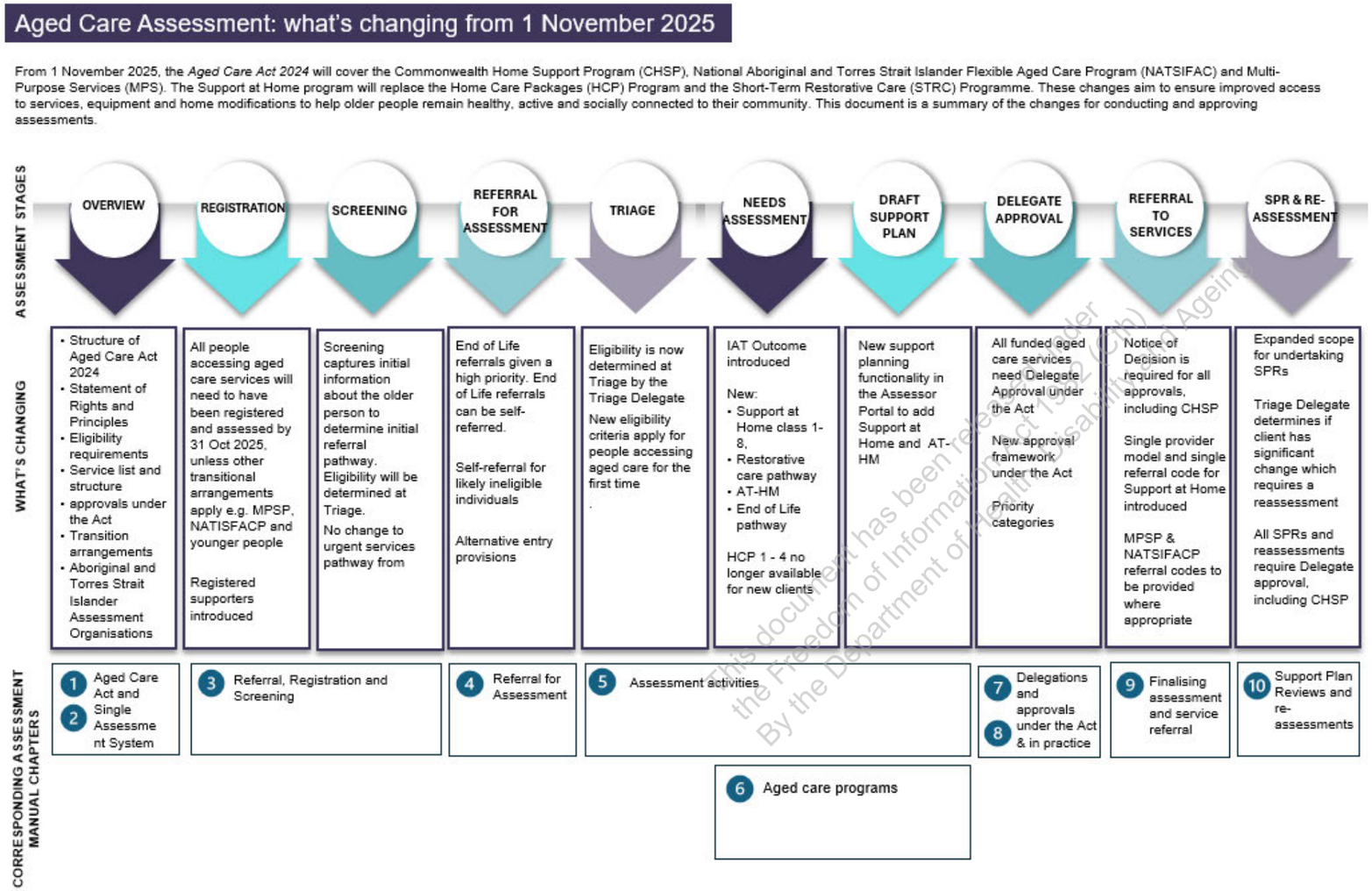

Figure 11 – Overview of changes in the assessment process from commencement of the Aged Care Act 2024

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APPENDIX B – Glossary

Table 59. Glossary of terms

Term	Acronym/ abbreviation	Definition
Administrative Review Tribunal	ART	The Administrative Review Tribunal (ART) provides independent merit reviews of a wide range of administrative decisions made by the Australian Government. The ART can review decisions made under Commonwealth and Norfolk Island laws. The ART aim to make their review process accessible, fair, just, economical, informal and quick.
Aboriginal and Torres Strait Islander Aged Care Framework		This Framework establishes a 2035 vision for older Aboriginal and Torres Strait Islander people to age well by having their spiritual, physical and mental health needs met through holistic, high-quality and culturally safe aged care. This care should promote wellbeing, deliver trauma aware and healing informed responses and empower connection to culture, family, community and Country or Island Home.
Aged Care Act 2024 (Cth)	The Act	The *Aged Care Act 2024* (Cth) replaces the *Aged Care Act 1997* (Cth) as the primary piece of aged care legislation from 1 November 2025. In response to the first recommendation of the Royal Commission into Aged Care Quality and Safety, the Act was developed to implement fundamental reforms to aged care. It provides a legislative basis for a rights based aged care system focused on the safety, health and wellbeing of older people. The legislative framework provided by the Act sets out the governance of the aged care system and the requirements to access and deliver funded aged care services. It further introduces a new risk-based regulatory model focused on increasing provider accountability and encouraging the delivery of high quality funded aged care services by registered providers.
Aged Care (Consequential and Transitional		The *Aged Care (Consequential and Transitional Provisions) Act 2024* provides for transitional arrangements to support the commencement of the *Aged Care Act 2024*.

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Term	Acronym/ abbreviation	Definition
Provisions) Act 2024		
Aged Care Act 1997 (Cth)		From 1 November 2025, the *Aged Care Act 1997* (Cth) will cease as the primary piece of aged care legislation. It will be superseded by the *Aged Care Act 2024* (Cth). From the cessation of the Act on 1 November 2025, Assessment Organisations should consult the *Aged Care Act 2024* (Cth) for information on access, delivery and governance of the aged care system.
Aged Care Assessment Quality Framework	Framework	Assessment organisations are required to use the Aged Care Assessment Quality Framework to maintain a consistent, high quality assessment experience for every older person.
Aged Care Diversity Framework		The Aged Care Diversity Framework is an overarching set of principles designed to ensure an accessible aged care system where people, regardless of their individual social, cultural, linguistic, religious, spiritual, psychological, medical and care needs are able to access respectful and inclusive aged care services.
Aged care needs assessor		A person who conducts aged care assessments, for home support and comprehensive assessments. An aged care needs assessor can be a clinical assessor or a non-clinical assessor.
Aged Care Principles		From 1 November 2025, the *Aged Care Act 2024* (Cth) will replace existing aged care legislation including the Aged Care Principles. Once commenced, Assessment Organisations should consult the *Aged Care Act 2024* (Cth) for information on access, delivery and governance of the aged care system.
AN-ACC Assessment Tool		Assessment tool used by residential aged care funding assessors to conduct residential aged care funding assessments.

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Term	Acronym/ abbreviation	Definition
Assessment organisations	N/A	An entity engaged by the Department to provide Aged Care Needs Assessment Services and/or RAC Funding Assessment Services.
Assessor	N/A	An aged care needs assessor.
Aged Care Specialist Officer	ACSO	ACSO, located in some Services Australia service centers, help people with their aged care matters and provide in-depth support including in relation to financial information and means assessment.
Active, appointed Decision Maker	N/A	'Active, appointed decision maker' is the term used for a person who would be considered a 'guardian etc.' under the *Aged Care Act 2024* (Cth). If a person is a registered supporter and is also an active, appointed decision maker for an older person (for example, the person is also an enduring attorney for the older person they are registered to support), they are recorded as a 'supporter guardian' for Information Communications Technology (ICT) purposes. Active, appointed decision makers can only make decisions for an older person within the scope of their legal authority under a Commonwealth, state or territory arrangement.
Assistive technology	AT	Is any item, piece of equipment or product that is used to help an older person do things more easily or complete activities they can no longer do independently.
Assistive Technology and Home Modifications (AT-HM) list	AT-HM list	A list that sets out the defined equipment, products, and home modifications that can be purchased for eligible participants under the AT-HM scheme.
Assistive Technology and Home Modifications scheme	AT-HM scheme	The scheme providing assistive technology and home modifications funding for eligible participants.

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Term	Acronym/ abbreviation	Definition
AT-HM scheme guidelines		The AT-HM scheme guidelines provide additional information and processes in relation to the AT-HM scheme.
AT-HM tier guide		A guide created to support assessors in making an AT-HM funding tier recommendation.
Australian National Aged Care Classification	AN-ACC	Funding model for residential aged care, effective from 1 October 2022.
Australian Privacy Principle/s	APP/s	The Privacy Act includes 13 APPs in Schedule 1 that apply to the handling of personal information by most Australian and Norfolk Island Government agencies and some private sector organisations.
Care finder		Care finders assist vulnerable older Australians who do not have someone who is able to help them access aged care services and other relevant supports in the community. Contact information for care finder services in each region is on the My Aged Care website at Help from a care finder | My Aged Care
Classification		Refers to the classification of a Support at Home participant, including: • Ongoing classification (Classifications 1-8) • Short-term classifications (AT-HM scheme, Restorative Care Pathway Classification and End-of-Life Classification). Also refers to residential care classification (ongoing or short-term)
Clinical aged care needs assessor		A clinically trained assessor who meets the qualification and training requirements outlined in the assessment organisation's contractual agreement with the Commonwealth and in the My Aged Care Workforce Learning Strategy 2024 (or subsequent versions). A clinical assessor undertakes complex (comprehensive)

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Term	Acronym/ abbreviation	Definition
		aged care needs assessments with older people and will be required to exercise clinical judgement.
Commonwealth Continuity of Support Programme	CoS	The Continuity of Support Programme has been replaced with Disability Support for Older Australians (DSOA).
Commonwealth Home Support Program	CHSP	The Commonwealth Home Support Program provides a broad range of entry-level support services to assist older people aged 65 years and over (50 years and over for Aboriginal and Torres Strait Islander people and people who are homelessness or at risk of homelessness) to live independently in their homes and communities. From 1 November 2025, the CHSP comes under the *Aged Care Act 2024*.
Comprehensive assessment		An assessment type for people with more complex needs. Comprehensive assessments are undertaken by clinical assessors.
Cultural Safety for Aboriginal and Torres Strait Islander people		The National Aboriginal and Torres Strait Islander Ageing and Aged Care Council (NATSIAACC) defined cultural safety as: 'Cultural safety requires understanding one's own culture and the impact that your culture, thinking, and actions may have on the culture and wellbeing of others through ongoing critical self-reflection. Only the care recipient themselves can determine whether the service is culturally safe. Ensuring access to a culturally safe, respectful, responsive and racism free aged care system is inherent for the optimal safety, autonomy, dignity, and absolute wellbeing of Aboriginal and Torres Strait Islander Elders, senior and older people, their families and community. Aged care service providers and workers must take responsibility for building trust and relationships with Aboriginal and Torres Strait Islander service users, and their families, and for creating a new aged care system which centres

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Term	Acronym/ abbreviation	Definition
		on their living experience, cultural, and ageing needs, as determined by Aboriginal and Torres Strait Islander service users themselves. The implementation of a trauma aware, healing informed approach to professional practice, and facilitating a greater understanding and respect for individual and collective cultures, histories, knowledges, traditions, stories, and values of Aboriginal and Torres Strait Islander service users, their families and communities, will greatly support the delivery of a quality and culturally safe aged care system. Aged care service providers must also firmly commit to continuously measure and improve structures and behaviours necessary for cultural safety and quality support to remain embedded in the Australian aged care system' According to the Australian Health Practitioner Regulation Agency (AHPRA): "Cultural safety is determined by Aboriginal and Torres Strait Islander individuals, families and communities." It involves ongoing critical reflection by health practitioners on their own knowledge, skills, attitudes, and power differentials, and how these affect their practice
Departmental delegate		A departmental employee whose position has been delegated powers and functions under a section of the *Aged Care Act 2024* (Cth) by the System Governor.
Disability Support for Older Australians	DSOA	DSOA provides funding for a range of services including Assistance in Supported Independent Living, Assistance with Self-Care Activities, Specialist/Behavioural Intervention Support, Therapy, and Case Management.
Elder Care Support Program		This workforce helps older Aboriginal and Torres Strait Islander people, their families and carers, to access aged care services across urban, regional and remote Australia to meet their physical and cultural needs.

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Term	Acronym/ abbreviation	Definition
Aboriginal and Torres Strait Islander Assessment Organisations	FNAO in My Aged Care System	Aboriginal and Torres Strait Islander Assessment Organisations were established from August 2025 to provide culturally safe, trauma aware and healing informed assessments.
Formal Services		Where formal services are referred to in this Manual these are paid services, such as government funded support.
Good Practice / Best Practice		Good practice is a matter of action. Best Practice is a recommendation.
Home modifications	HM	Changes to an older person's home to create a home environment that is safer and more accessible, so they can remain living safely at home.
Home Care Package Program	HCP	The HCP Program supported older Australians with complex care needs to live independently in their own homes. There are 4 levels of s — from level 1 for basic care needs to level 4 for high care needs. The Program ceased on 31 October 2025, replaced by the Support at Home program.
Informal Services		Where informal services are referred to in this Manual this is the unpaid support provided by carers, family, neighbours or other community organisations.
Integrated Assessment Tool	IAT	The IAT is an assessment tool used to assess eligibility for all aged care programs.
ISBAR		The ISBAR framework represents a standardised approach to communication which can be used in any situation. It stands for Introduction, Situation, Background, Assessment and Recommendation. The ISBAR is the format which must be used when drafting a Support Plan.
Multi-Purpose Service Program	MPSP	The Multi-Purpose Service Program (MPSP) is a joint initiative of the Australian Government and state and territory governments. It aims to deliver flexible and integrated health and aged care services to some small rural and remote

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Term	Acronym/ abbreviation	Definition
		communities that could not viably support stand-alone hospitals or aged care facilities.
My Aged Care contact centre	The contact centre	The My Aged Care contact centre is the starting point to access Australian Government-funded aged care services. The Freecall phone line (1800 200 422) and website https://www.myagedcare.gov.au/contact-us can help older Australians, their families and carers to get the help and support they need.
My Aged Care service provider and assessor helpline	Helpline	My Aged Care service provider and assessor helpline (1800 836 799) is the industry helpline for My Aged Care portal issues. They provide a reference number to track the progress of a complaint or issue and notification when the ticket is closed. Issues can be escalated to other teams within the department as appropriate. Call from 8am to 8pm Monday to Friday or 10am to 2pm Saturday.
My Aged Care Workforce Learning Strategy		The My Aged Care Workforce Learning Strategy 2025 (Workforce Learning Strategy), and subsequent editions of this strategy defines and sets the minimum training requirement for the Single Assessment System workforce and the My Aged Care workforce, including timeframes for completion. The My Aged Care Assessment Workforce Learning Strategy can be found at this link.
My Aged Care Learning Management System	MAClearning	The delivery of training to the My Aged Care Workforce organisations occurs via the My Aged Care Learning Management System (MAClearning). MAClearning provides assessors with: • access to mandatory and optional online learning, • information about mandatory appraisal activities, and • a record of all completed learning and appraisals

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Term	Acronym/ abbreviation	Definition
My Health Record	MHR	My Health Record is a secure online summary of key patient health information. Healthcare providers can access the system to view and add information.
National Aboriginal and Torres Strait Islander Flexible Aged Care Program	NATSIFAC	The National Aboriginal and Torres Strait Islander Flexible Aged Care Program funds organisations to provide flexible, culturally appropriate aged care to older Aboriginal and Torres Strait Islander people close to their home and community. These services are mainly located in remote and very remote locations.
National Disability Insurance Scheme/Agency	NDIS or NDIA	The NDIS provides support for people with disability, their families and carers in Australia. The NDIS will provide all Australians under the age of 65 with a permanent and significant disability with the reasonable and necessary supports they need to live an ordinary life. This may include personal care and support, access to the community, therapy services and essential equipment.
Non-clinical aged care needs assessor	Non -clinical assessor	An assessor who meets the qualification and training requirements outlined in the assessment organisation's contractual agreement with the Commonwealth and in the My Aged Care Workforce Learning Strategy 2024 (or subsequent versions). A non-clinical assessor undertakes simple (home support) aged care needs assessments with older people.
Prescribed assistive technology		Assistive technology that would benefit from a prescription from a suitably qualified health professional.
Privacy Act 1988	The Privacy Act	The *Privacy Act 1988* applies to the collection, retention and use of personal information by assessors and regulates the handling of personal information about individuals, including the collection, use, storage and disclosure of personal information and access to and correction of that information.
Progressive condition		A medical condition that worsens over time, resulting in a range of limitations in function which can affect quality of life, daily living and community activities. (The 13 conditions listed

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Term	Acronym/ abbreviation	Definition
		below are all eligible AT-HM progressive conditions under SaH). These conditions include: • Cerebral Palsy • Epilepsy • Huntington's Disease • Motor Neurone Disease (MND) noting different phenotypes require different management • Multiple Sclerosis (MS) • Parkinson's Disease • Late effects of Polio • Spinal Cord Injury • Spinal Muscular Atrophy • Stroke • Acquired Brain Injury noting different types of brain injury require different management • Muscular Dystrophies and Muscular Atrophies.
Reassessment		In this manual, the term 'reassessment' is used to describe a subsequent assessment of a person's aged care needs who is already accessing aged care services. Section 64 of the *Aged Care Act 2024* provides for aged care needs reassessments. A reassessment may be required when an individual's circumstances have changed. In the *Aged Care Act 2024* the term 'reassessment' is used as an umbrella term to describe both SPRs and reassessments. An individual may request a reassessment if they believe their aged care needs have changed, or it may be identified through a scheduled SPR.
Reablement		Wellness and reablement are related concepts, often used together to describe an overall approach to service delivery. Wellness and reablement approaches are based on the idea that, even with frailty, chronical illness or disability, most people want and are able to improve their physical, social, and emotional

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Term	Acronym/ abbreviation	Definition
		wellbeing, to live autonomously and as independently as possible. Reablement offers time-limited interventions and emphasises assisting people to maintain, regain, improve confidence and functional capacity and maximise independence and autonomy. It focuses on specific goals and seeks to enable people to live their lives to the fullest.
Residential aged care funding assessment	RAC funding assessment	An assessment a residential aged care funding assessor completes using the AN-ACC assessment tool. Defunct term: AN-ACC assessment.
Residential aged care funding assessor	RAC funding assessor	An aged care assessor who is completing a residential aged care funding assessment using the AN-ACC assessment tool. Defunct term: AN-ACC assessor.
Residential Respite Care (Residential Care – short term)		Residential respite care is short-term care provided in an aged care home. It can be on a planned or emergency basis. Respite gives a carer or care recipient a break from their usual care arrangements. A clinical assessor and approves care recipients to access respite care.
Restorative Care Pathway	RCP	The Restorative Care Pathway, under Support at Home, replaces the Short-Term Restorative Care (STRC) programme. It aims to provide early intervention opportunities to support older people to restore function through coordinated, goal orientated support focusing on multi-disciplinary allied health services. It can be delivered in home or community settings and can be for up to 16 weeks.
Referral Codes Letter		The referral codes letter is also known as the 'Referral codes and List of Providers' Letter On the assessor portal, it is generated via the 'Generate Referral code Letter' button

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Term	Acronym/ abbreviation	Definition
Single Assessment System program		The Commonwealth Government funds assessment organisations to administer aged care needs assessments, which include both home support and comprehensive assessments. This term is used to define the assessment program which includes all assessment types.
Single Assessment System workforce		Refers to the aged care assessment workforce from late 2024. This term also includes organisations that deliver Residential Aged Care Funding assessments.
Specialist Aged Care Programs		Means a Government program for delivering funded aged care services that (a) is given effect through one or more agreements or arrangements entered into by the Commonwealth under subsection 247(1) or section 264 of the Act for the program; and (b) meets any other requirements prescribed by the rules. It includes the Multi-Purpose Service Program, Transition Care Program, National Aboriginal and Torres Strait Islander Flexible Aged Care (NATSIFAC) Program, and Commonwealth Home Support Program (CHSP).
Specified need		Refers to participants who require ongoing assistive technology funding for the essential maintenance of their assistance dog.
(Commonwealth) Subsidised and non-subsidised aged care services		Commonwealth subsidised aged care programs broadly include those under the Aged Care Act. These services can receive My Aged Care portal referrals and can be service recommendations on the Support Plan. Non-subsidised services are those services and supports that are NOT Commonwealth funded aged care. These services cannot receive referrals through the My Aged Care portal, are NOT listed in the My Aged Care service finder and are noted as general recommendations on the Support Plan.
Support Plan		The Support Plan is an important and ongoing document for the older person that can be updated as an older person's needs change. It details the outcomes of discussions with, and assessments of, the older person, including

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Term	Acronym/ abbreviation	Definition
		what the older person would like to improve and achieve (their goals), and agreed actions to be taken. It is a continuous document (i.e. an older person only has one Support Plan).
Support Plan Review	SPR	A Support Plan Review relates to the effectiveness and appropriateness of the older person's Support Plan. An assessor may set a review date on the Support Plan at the time of the assessment or initiated on an ad-hoc basis. A review may also be requested by an older person or a service provider where there is a change in the older person's needs or circumstances. It may be completed over-the-phone with the older person.
Transition Care Program	TCP	Transition Care provides short-term, goal oriented and therapy-focused care for older Australians after hospital stays either in a home or community setting or in a residential aged care setting.

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APPENDIX C – Contact details

Table 60. Contact details

Contact point	Details
Right of Review	A person can request a review to an assessment outcome by writing to: The Secretary Department of Health, Disability and Ageing Attn: Review of Decisions Section GPO Box 9848 ADELAIDE SA 5001
Assessment Operational manager	Please contact your assessment organisation operational manager in the first instance for all queries and/or issues.
Registered supporters	Documentation to request to register a supporter can be sent to My Aged Care by: • Uploading to the My Aged Care Online Account • Uploading it as part of the online registration process on the My Aged Care website • Sending a digital copy via the My Aged Care online form available at: https://www.healthdirect.gov.au/myagedcareupload or • Providing it to an Aged Care Specialist Officer or assessor for face to face help uploading it to My Aged Care. • Posting to: My Aged Care PO Box 1237 Runaway Bay, QLD 4216
Carer Gateway	1800 422 737
My Aged Care contact centre	1800 200 422
My Aged Care Service Provider and Assessor Helpline	1800 836 799 8am to 8pm Monday to Friday or 10am to 2pm Saturday
My Aged Care complaints	A person can make a complaint by: • calling My Aged Care on 1800 200 422 • lodging an online feedback form on the My Aged Care website at myagedcare.gov.au/contact-form • posting their complaint to: My Aged Care Complaints PO Box 1237

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Contact point	Details
	Runaway Bay QLD 4216
Services Australia	1800 227 475 (Aged Care Line - consumers)

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APPENDIX D – Clinical governance guidance for aged care needs assessment organisations

Guidance purpose

This guidance aims to help aged care assessment organisations to meet their responsibilities for ensuring the quality of needs assessments, through the implementation of effective clinical governance. The sections below are for people within an assessment organisation responsible for developing their clinical governance framework. It describes the importance of good clinical governance, details the elements of an effective clinical governance framework in an aged care needs assessment context and outlines the minimum supports that must be in place to support clinical and non-clinical staff.

This guidance should be considered in conjunction with the resources on clinical governance in the provision of aged care services available on the Aged Care Quality and Safety Commission's website.

What is a clinical governance framework and why is it important for aged care assessment organisations?

Clinical governance is an integrated system of organisational behaviours, policies, procedures, responsibilities, and quality assurance mechanisms that support consistent and high-quality care in organisations across the health, aged care and many social services sectors. A clinical governance framework is a framework that describes an organisation's approach to clinical governance.

Your assessment organisation's clinical governance framework must describe the practical, clinical supports that are in place for staff who may need to exercise clinical judgement or undertake elements of an aged care needs assessment that are clinical in nature.

Good clinical governance supports everyone in your assessment organisation to achieve high quality aged care assessments that deliver accurate and appropriate outcomes for all older people. High quality assessments are defined in the Aged Care Assessment Quality Framework as:

Personal: an assessment is a respectful conversation and is responsive to an older person's individual situation, context, goals and aspirations.

Effective: assessments are undertaken in depth and to completion, ensuring an older person's needs are fully identified and an older person can exercise choice and control in accessing the right services appropriate for them (as available and as eligible).

Connected: the older person understands how and why the assessment process connects to their aged care journey.

Safe: the older person is provided a physically, emotionally and culturally safe assessment where their unique experiences are respected and factored into the way they are assessed for aged care. All assessments are delivered in a safe environment and free from harm.

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Importantly, clinical governance must be embedded in your organisational culture. Leaders must foster a culture that supports and promotes consistent, high quality assessments and integrates clinical governance into the broader organisational governance. Your organisation's governing body is accountable for ensuring adequate clinical support is in place for staff, understanding the risks associated with undertaking assessments, monitoring performance, and continuously driving improvement.

How to use this guidance

This guidance outlines the elements that your assessment organisation must include in its clinical governance framework, and details the minimum, practical clinical supports that must be in place for your workforce who may need to exercise clinical judgement or undertake an assessment that is clinical in nature.

Your assessment organisation may develop its clinical governance framework in a format that suits them and include additional elements that are not covered in this guidance. For assessment organisations with an existing clinical governance framework, a review will be required to ensure all elements in this guidance are included.

Elements of a clinical governance framework

At a minimum your assessment organisation's clinical governance framework must demonstrate how it will:

Define **roles and responsibilities** to provide clarity on how clinical governance will operate.

Recruit, **train and accredit staff** to build a highly skilled and qualified assessor workforce.

- Provide **clinical support** to assessors.
- Monitor assessment quality and drive continuous improvement.
- Build relationships to foster innovation and continuous improvement.

The minimum clinical support requirements that sit under each of these elements are detailed in the next section.

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Element 1: Define roles and responsibilities to provide clarity on how clinical governance will operate

Table 61. Roles and responsibilities

Clinical support requirement	Implementation
Staff understand the boundaries of their role as a clinical assessor or clinical delegate, and the functions that are not suitable to perform when undertaking those roles. E.g. Clinical assessors who are registered nurses should not dress wounds when undertaking an assessment. Staff understand the boundaries of their role as a non-clinical assessor and non-clinical assessment delegate and	Each staff member is assigned the correct clinical role/s in the My Aged Care Assessor Portal and job position on MAClearning. The organisation's Work, Health and Safety framework outlines procedures that uphold staff safety. Completion of workplace training on the organisation's clinical attendance policy and clinical governance framework. Completion of workplace training on the organisation's clinical attendance policy and clinical governance framework.

Clinical support requirement	Implementation
understand when and how they will need to operate under their organisation's clinical governance throughout the assessment process.	

Element 2: Recruit, train and accredit staff to build a highly skilled and qualified assessor workforce

Table 62. Role and training requirements

Clinical support requirement	Implementation
perform a needs assessment, prior to undertaking an assessment with an older person.	Workforce Learning Strategy 2025 (and subsequent versions) including mandatory online learning on the MAClearning system and completion of appraisal activities to validate assessor capabilities.
Prior to a clinical assessment delegate approving their first service recommendation, the delegate is competent to approve service recommendations.	Completion of training outlined in the My Aged Care Workforce Learning Strategy 2025 (and subsequent versions) and mandatory online learning on the MAClearning system.
Prior to a triage delegate triaging their first assessment referral, the delegate is competent to undertake triage.	Completion of training outlined in the My Aged Care Workforce Learning Strategy 2025 (and subsequent versions) and mandatory online learning on the MAClearning system
All non-clinical assessors are competent in seeking clinical attendance in the event they trigger clinical questions in the IAT	Completion of training outlined in the My Aged Care Workforce Learning Strategy 2025 (and subsequent versions) and mandatory online learning on the MAClearning system
Relevant staff are qualified to undertake a clinical role.	Staff who are recruited to clinical roles within the assessment organisation meet the qualification requirements outlined in the assessment organisation's contractual agreement and detailed in the My Aged Care Workforce Learning Strategy 2024 (or subsequent versions).

Element 3: Provide clinical support to assessors

Table 63. Clinical support to assessors

Clinical support requirement	Implementation
Provide ongoing support for assessors in the field	Provide ongoing clinical governance support for assessors in the field including providing peer support and advice on emerging and specific issues as well as providing supervision to non-clinical staff during the clinical attendance process and in finalising support

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	plans. Ongoing support is provided through various communication channels via the assessment organisation's standard operating procedures.

Element 4: Monitor assessment quality and drive continuous improvement

Table 64. Monitoring of assessment quality and continuous improvement

Clinical support requirement	Implementation
Clinical staff are supervised and mentored by a clinically trained Team Leader	Team leaders regularly engage with triage delegates, assessment delegates and assessors in peer review processes
Staff receive regular feedback about the quality of their assessments and the performance of their organisation	Assessment organisations measure and report the extent to which it achieves the Aged Care Quality Standards, and quality goals included in the Aged Care Assessment Quality Framework. The Assessment organisation's leadership team use quality assurance data to drive continuous improvement in clinical governance policies and processes. The Assessment organisation actively participates in any external evaluation or quality assurance processes.

Element 5: Build relationships to foster innovation and continuous improvement

Table 65. Relationship building to foster innovation and continuous improvement

Clinical support requirement	Implementation
Build effective working relationships with local support services	Implement systems and processes to ensure positive communication between service and care providers within the aged and health care systems.
Foster an organisational culture of regular and effective communication that addresses risks and issues and promotes continuous improvement	Assessment organisations hold regular team meetings/teleconferences to address issues arising, share experiences and clinical expertise (including case study discussions)
Assessment Organisation's representatives participate in relevant forums organised by the Department	Assessment organisations must send representatives in person to attend forums for assessment organisations as organised by the Department.

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APPENDIX E – Clinical attendance

Questions in the IAT that require clinical attendance

Table 66. IAT questions that require clinical attendance

IAT clinical questions	When these questions will be triggered	Detail
Advanced Medical Assessment section	Answers 'Moderately' or 'Quite a bit' to Q *Impact of health issues on normal activities.*	This question set identifies whether the older person has had recent contact with a GP and/or has regular health checks, has been admitted to hospital in the past 12 months and whether the older person has and/or has had allergies and/or sensitivities such as food, medication and environmental allergies and/or sensitivities. See IAT User Guide: Integrated Assessment Tool user guide (health.gov.au)
Urinary incontinence and Revised Urinary Incontinence Scale (RUIS)	Answers No to '*Is the older person managing urinary incontinence issue?*'	An assessor should use the RUIS to assess urinary incontinence. Urinary incontinence refers to the involuntary loss of bladder control. The severity can vary, including occasional leakage of urine when coughing or sneezing. It would become an issue at the more severe end when an older person often experiences a sudden and strong urge to urinate (urgency) that doesn't allow enough time to reach a toilet. Continence is a sensitive and private issue. The assessor must use clinical judgement to determine the appropriateness of administering the RFIS with the older person at assessment. Urinary incontinence | healthdirect

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IAT clinical questions	When these questions will be triggered	Detail
		(PDF) Technical Manual and Instructions: Revised Incontinence and Patient Satisfaction Tools, Version 2 (researchgate.net) (tool on pg. 27)
Bowel incontinence and Revised Faecal Incontinence Scale (RFIS)	Answers 'No' to '*Is the older person managing bowel incontinence issue?*'.	Technical Manual and Instructions for Revised Incontinence and Patient Satisfaction Tools 1 (anzctr.org.au) An assessor should use the RFIS is used to assess faecal incontinence. Continence is a sensitive and private issue. The assessor must use clinical judgement to determine the appropriateness of administering the RFIS with the older person at assessment.
GPCog- Step 2 and extended cognitive assessment	If the older person has answered any of the Qs in GPCog- Step 1 incorrectly.	The GPCog- step 2 and extended cognitive assessment is a screening tool for cognitive impairment. It builds on the questions asked in GPCog- step 1. GPCOG | Home The GPCOG: A New Screening Test for Dementia Designed for General Practice (Step 2 Qs at bottom of the journal article)
Extended Behaviour Assessment	Answers YES to the question. *Are there any reported changes in the older person's personality?*	This question set identifies changes in an older person's behaviour across several behavioural types. See IAT User Guide: Integrated Assessment Tool user guide (health.gov.au)

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IAT clinical questions	When these questions will be triggered	Detail
Advanced Psychological Assessment (PHQ-4)	If there is a total score of three or more from the first two PHQ questions (Feeling nervous, anxious or on edge AND not being able to stop or control worrying), additional questions on advanced psychological assessment will be prompted.	This question set identifies the extent to which an older person experiences psychological distress. See IAT User Guide: Integrated Assessment Tool user guide (health.gov.au)
Geriatric Depression Scale (GDS)	Additional question in advanced psychological assessment. Answer 'yes' to *Do you want to complete the Geriatric Depression Scale?*	The GDS is a basic screening measure for depression in older people. Geriatric Depression Scale (stanford.edu)

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Older person scenarios — clinical attendance

Meet Clyde

Clyde is 78 years old and needs some extra support so that he can continue to live in his home. He applies for an aged care assessment through My Aged Care. When Clyde is contacted by the assessment organisation, he is asked some preliminary questions (known as triage) before his assessment is scheduled. Clyde has heard some bad stories recently about residential aged care and he is worried that the assessment will result in him moving into an aged care home. Clyde feels nervous when answering the questions at triage and he doesn't fully disclose his health concerns during the conversation.

Clyde is triaged for a home support assessment. A non-clinical assessor is assigned to undertake the assessment, and travels to Clyde's home. During his assessment, Clyde's answers trigger questions that require clinical judgement. The assessor explains to Clyde that there are some questions that will need to be asked with a clinical assessor, who they can call on their tablet.

Clyde agrees and a clinical assessor is video called. Clyde and his assessor explain his situation to the clinical assessor, and the IAT questions that have been triggered. Together, the assessors undertake the whole assessment and record Clyde's needs in the IAT. When the non-clinical assessor gets back to the office, they finalise the assessment, consulting with the clinical assessor to make the recommendations.

Clyde is found eligible for services. The assessor converts the assessment to a comprehensive assessment at the end of the assessment. Clyde's assessment is finalised and is sent to an assessment delegate for approval.

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Meet Jane

Jane is 70 years old and lives alone. Jane and her family have spoken about her needing some support to help with home duties. Jane has chronic arthritis and sometimes this can affect her activities. At the time she first speaks to an assessment organisation about her health and abilities (triage), the weather is warm, and Jane is feeling good. Her arthritis is not affecting her day-to-day activities.

Jane is triaged for a home support assessment. A non-clinical assessor is assigned to undertake the assessment, and travels to Jane's home. On the day of the assessment, the weather is cold, and Jane isn't feeling as well as she did at triage. During her assessment, Jane answers a question which triggers a question set that requires clinical judgement. The assessor knows that a clinical assessor is not available to be in attendance during the assessment. The assessor selects 'no' to the declaration and makes a note of the questions that are triggered. The assessor explains that they can only ask certain questions in the assessment today and that some questions will need to be asked with a clinical assessor at a later time. The assessor asks the questions that do not require clinical judgment. The assessment concludes. When the assessor gets back to the office, the assessor speaks to their Team Leader or a clinical assessor about the assessment. At this stage it is determined that the clinical assessor can complete the clinical questions by calling Jane and asking the questions raised during the assessment. The original, non-clinical assessor arranges a time to contact Jane with the clinical assessor to ask the remaining questions. Together they finalise the assessment and although the clinical questions were triggered during the assessment, it is found that Jane's needs can be supported through CHSP services

Meet Alex

Alex loves working with older people and is excited about their new role as a non-clinical aged care needs assessor. Alex arrives at the house of an older person to undertake a home support assessment. Alex is welcomed inside, and notes straight away that the older person's needs seem more complex than what was recorded at triage. Not long into the assessment, a clinical question is triggered that requires clinical judgement. Alex explains to the older person that there are some questions that they will need to ask with the support from a clinical assessor who they can call on Alex's phone. The older person agrees and a clinical assessor is called. Alex explains the situation, including the clinical questions that have been triggered. The clinical assessor considers the questions that have been triggered, Alex's experience as an assessor and the older person's situation. Based on these factors, the clinical assessor advises that it would be best for a clinical assessor to undertake the whole assessment.

Alex concludes the assessment and the older person's assessment is reassigned to a clinical assessor with high priority which occurs on another day.

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APPENDIX F – Wellness and reablement

Introduction

My Aged Care has been established to support older people to maximise their independence and enable them to remain living safely in their own homes and communities. The role of the assessor is to work with the older person to develop an individualised Support Plan so the older person can focus on their own strengths and goals to better support their continued independence. This means assessors should not refer the older person for services they can do safely for themselves. The longer an older person avoids reliance on ongoing services, the longer they are likely to maintain their functional independence, giving them more good days doing the things that matter to them most.

Wellness and reablement approaches build on people's strengths and goals to promote greater independence and autonomy, and it starts with the assessment. Wellness and reablement are inclusive approaches that involve assessment, planning and delivery of supports that build on the strengths, capacity, and goals of individuals irrespective of age, capacity, diagnosis or setting. Referring for support that focuses on the individual's goals and recognises the importance of older people's participation is fundamental to aged care.

What is Wellness and reablement?

Wellness and reablement are related concepts, often used together to describe an overall approach to service delivery. They are grounded in the principle that older people, including those with frailty, chronic illness or disability, can maintain or improve their independence, and physical, social and emotional functioning. These approaches support older people to live with purpose, make autonomous choices, and participate in meaningful activities which supports their wellbeing.

By focusing on capacity-building and restoring or maintaining function, wellness and reablement approaches directly contribute to the wellbeing outcomes described in the Aged Care Act and Strengthened Aged Care Quality Standards. These support older people to live safely, independently, and with a sustained sense of meaning and connection in their own homes and communities.

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Wellness

Wellness is a philosophy that informs how providers should work with participants by building on their strengths, abilities and goals to promote greater independence and quality of life. A wellness approach avoids 'doing for' when 'doing with' can support a participant to undertake an activity with less assistance, acknowledging the abilities of the participant and building on their strengths and skills. A wellness approach also aims to empower participants to take charge of, and participate in, informed decision-making about the care and services they receive. It's about listening to what the participant wants to do, looking at what they can do, and focusing on regaining or retaining their level of function so that they can continue to manage their day-to-day life.

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Reablement

Reablement offers time-limited interventions that focus on achieving a participant's specific goal or desired outcome. It involves maintaining or regaining skills, improving functional capacity, improving confidence and enhancing capability so a participant can resume everyday activities. Reablement services apply a wellness approach and aim to get a client 'back on their feet', and able to resume previous activities either without needing ongoing service delivery or with a reduced need for services. Service providers should identify opportunities for reablement as part of their ongoing support of participants.

Why wellness and reablement is important

Emerging research has demonstrated the benefits of focussing on older people's independence. Traditional models of service delivery that focus on what an older person can't do rather than what they can, leads to an over-reliance on services by older people, which has been linked with accelerated functional decline.

Understanding the ageing journey – the life curve

Research suggests the largest influencer in age-related decline is not genetics, but rather lifestyle choices. People who continue to do things for themselves tend to remain independent and live better, longer.

Professor Peter Gore of the Institute of Aging at Newcastle University in the United Kingdom has developed a framework to understand the age-related decline. The framework, called the LifeCurveTM, looks at the impact of maintaining independence on quality of life and the rate of age-related functional decline. It illustrates that the sooner someone stops performing certain tasks for themselves, the faster they tend to lose their functional ability. The aim is to assist people to perform these daily tasks independently for as long as possible, to maximise independence and autonomy. Retaining physical ability helps people to continue doing the things they enjoy for longer.

The LifeCurveTM is shown at Figure 12. The vertical axis lists activities of daily living that older people generally lose over time, in the order in which they tend to be lost, from top to bottom, with the horizontal axis representing elapsed time. The timeframe for this decline is variable and can be influenced by behaviour and interventions. For example, difficulty cutting one's toenails is typically seen as an early indicator that intervention may be needed. The graph shows two trajectories: a sub-optimal life curve with a fast early decline; and an optimal life curve in which the early decline is slowed down to give people more good days before losing the ability to undertake activities like walking, shopping and personal care.

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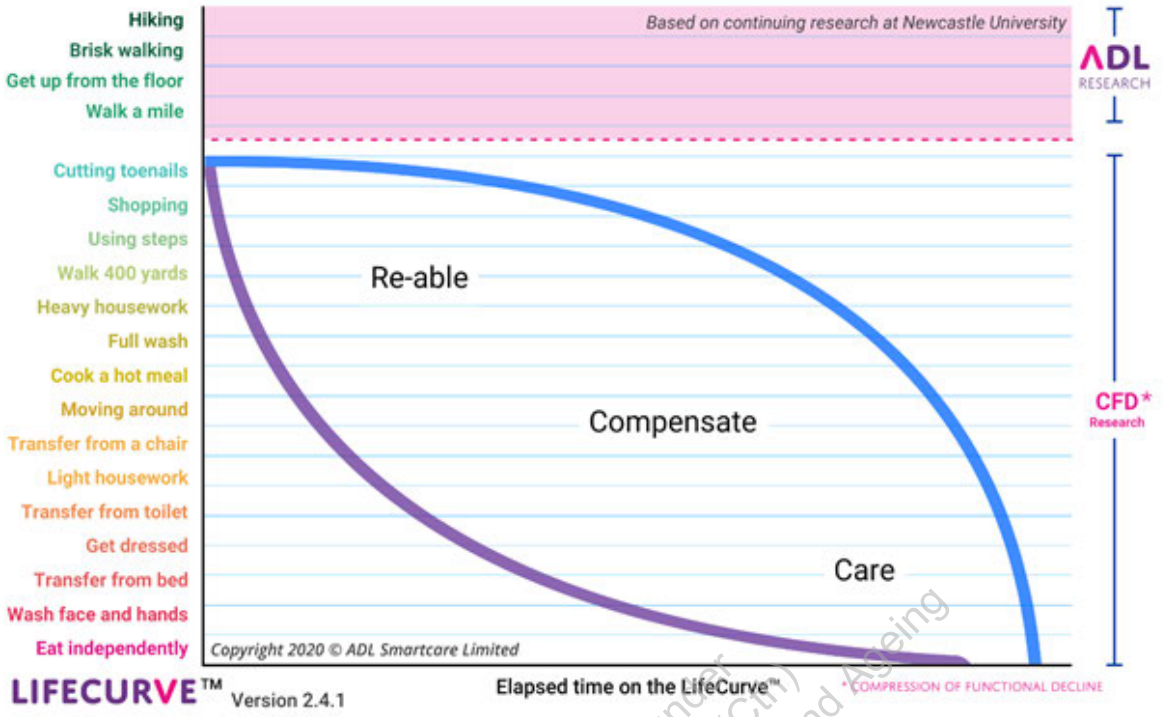

Figure 12 – LifeCurveTM

The LiveUp website enables Australians over 65 years of age to check their health and find personalised suggestions for products and services that promote healthy ageing. LiveUp can suggest low-cost assistive products and equipment to help people with everyday living, as well as personalised exercises and services, to help them or a loved one with age-related wellbeing.

At the LiveUp website anyone can download the free LifeCurveTM that can track a person's health, giving them easy to understand long term advice tailored to their needs. To learn more about LiveUp, go to www.liveup.org.au or call 1800 951 971.

Benefits of a wellness and reablement approach

Older people are not the only ones who benefit from wellness and reablement. Evidence suggests there are also significant benefits to assessment organisations, service providers, families and carers, and the broader community.

Benefits for older people

Implementing a wellness and reablement approach at the earliest opportunity (with a focus on older person goals to maintain or regain functional capacity and social connectedness) can have significant long-term benefits for older people including:

- older people appreciate being asked what is important to them, and to be included in decision-making
- improved sense of purpose, autonomy and self-worth
- improved physical and emotional health and wellbeing
- reduction in service delivery needs

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- increased ability to remain living independently and safely in their own homes for longer
- greater quality of life and retention of pride and dignity
- improved connection with community; and
- reduced strain on family and carer relationships.

Benefits for aged care assessment organisations

Reablement focused assessment has flow on benefits for aged care organisations as they can better utilise support workers to focus on more complicated tasks that their older people can't perform for themselves, resulting in more meaningful and fulfilling work. Importantly, it enables providers to broaden their older person base by offering more short-term support by freeing up longer term service provision. All of which better aligns to aged care reform initiatives and improving the ability to assessment and provider organisations to respond to changes in aged care policy.

Implementing wellness and reablement provides significant benefits for assessors and their older people including:

- reablement focussed (active) assessment better demonstrates need. This benefit extends to older people with poor reablement prospects, as active assessment better identifies if ongoing services are needed, or if short-term reablement support will help the older person get back to previous levels of independence
- reablement focussed assessment provides a more holistic approach to assessment
- greater job satisfaction by actively helping older people to identify goals and become more independent; and
- improved business reputation based on providing person-centred, holistic assessments that focus on individual older person goals, needs and preferences.

Benefits for families and carers

Wellness and reablement approaches can have significant benefits for family members and carers, including:

- opportunities to be involved in supporting their loved one to meet their goals
- peace of mind in knowing their loved one is retaining or regaining their independence, improving their wellbeing and quality of life
- reduced worry and concern over their loved ones along with reduced strain and pressure due to a decrease in caring requirements.

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Older person scenarios — Applying a wellness and reablement approach

HARRY is a 70-year-old man who lives alone. After contacting My Aged Care, a face-to-face home support assessment was undertaken which identified Harry needed some assistance with clothes-washing and meals. The assessor applied a wellness and reablement approach in the assessment, asking Harry to show how he performed tasks around the home, observing what he could do for himself and asking him what goals he wanted to achieve.

At first, Harry didn't know what to say. He thought he was too old to set new goals, but indicated he was open to doing the cooking. Harry said he lacked confidence and skills as his wife, who recently passed away, had always done most of the cooking. With this information, the assessor referred Harry for support with planning his grocery shopping and meal preparation. With this support, Harry could work out what he wanted to cook, plan his shopping to obtain the necessary ingredients, and then helped his support worker prepare the meals while receiving basic cooking instructions.

Learning these skills built Harry's confidence to manage his shopping and cook his own meals, increasing his independence and quality of life.

During the assessment, the assessor also encouraged Harry by helping him identify task simplification strategies to do the laundry with some support. Instead of referring for domestic assistance three times a week, the assessor advised Harry to wash and hang his clothes using a trolley and an easy-to-reach drying rack inside, instead referring him for once-a-week support to help him hang out heavier washing, like sheets and towels.

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ELSA is a 72-year woman with osteoarthritis who has been receiving domestic assistance under the CHSP for two hours a week to provide assistance with general housework and laundry. Elsa required no other assistance.

During a Support Plan Review, the non-clinical assessor applied a wellness and reablement approach to Elsa's continuing needs, asking Elsa to demonstrate how she completed light household chores such as dusting, wiping over surfaces, washing the dishes and using a lightweight carpet sweeper.

Applying a reablement approach, over a two-month period instead of 'doing for', Elsa was encouraged to undertake some of these tasks by herself, whilst the support worker completed more difficult tasks, such as vacuuming and mopping.

Elsa still requires ongoing support; however, she is now more involved and independent, has increased activity levels, and feels more satisfied about continuing to live at home.

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Principles of wellness and reablement

Wellness and reablement describe an overall approach to service delivery.

Employment of wellness and reablement approaches in aged care organisations promotes client wellbeing, independence, function, and management of activities of daily living.

In line with the Statement of Rights, ways to apply wellness and reablement approaches include:

- **Promote independence** – people value their independence, loss of independence can have a devastating effect, particularly for older people who may find it more difficult to regain.
- **Identify older person's goals and motivation** – a person's independence requires more than just services to help them remain in their home and maintain their current capacity. Service delivery should focus on supporting the older person to actively work towards their goals and improved independence wherever possible.
- **Consider physical and psychosocial needs** – independence is not limited to physical function, it includes both social and psychological function. Support should be tailored to the individual and aim to improve their physical, social and emotional wellbeing.
- **Encourage participation of older people** – being an active participant, rather than a passive recipient of services, is an important of being physically and emotionally healthy. Service delivery should focus on assisting a person to complete tasks, not taking over tasks that a person can do for themselves.
- **Regular assessment** – older person assessment should be ongoing, not one-off. It should focus on progress towards older person goals and consider the support and duration of services required to meet these goals.
- **Focus on strengths** - the focus should be on what a person can do, rather than what they can't. Wherever possible, services should aim to retain, regain, or learn skills rather than creating dependencies.
- **Support older people to reach their potential** – help older people to maintain and extend their activities in line with their capabilities.
- **Individualise support** – service delivery should be individualised and suited to the goals, aspirations and needs of the individual.
- **Regular review –** a person's assessment should be ongoing, not one-off. It should focus on progress towards goals and consider the support and duration of services required to meet these goals.

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HELEN is a 78-year woman with osteoarthritis. Lately, Helen has had difficulty performing household cleaning duties and doing her laundry. At assessment, the assessor undertook a reablement-focused (active) assessment to better identify Helen's needs.

By asking Helen to show the assessor how she did her housework (active assessment), the assessor identified lighter tasks that Helen could still complete, but certain tasks impacted her arthritis. During the assessment, the assessor asked Helen what she enjoys and the goals she would like to achieve. Helen identifies she used to enjoy keeping her home clean and tidy but is feeling lonely because she worries visitors may think she isn't coping around the house as well as she used to.

In working with Helen to develop a Support Plan, the assessor focusses on Helen's strengths and the things she wants to regain/maintain. As a result of the active assessment, the Support Plan refers Helen for short-term reablement support over a two-month period where Helen does lighter housework while the support worker completes tasks that provoke Helen's arthritis, such as vacuuming and mopping.

Although Helen requires ongoing support with more difficult domestic duties, she has improved her functional capacity and feels more like herself. By adopting a strength-based approach to assessment and service delivery, focusing on 'doing with' not 'doing for', Helen is able to maintain some physical activity and by regaining some independence she is feeling more fulfilled and capable. Helen has begun engaging with her friends again which has improved her social connectedness.

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Time-limited support

Wellness and reablement approaches often involve time-limited services. Time-limited care aims to address an older person's specific barriers to independence and support them getting back to doing things for themselves. This involves a targeted timeframe, developed with the older person, for achieving their goals.

Understanding what a good day looks like for an older person and how it relates to their individual goals and outcomes is important for determining short-term support needs. This could be maintaining a level of activity or independence or working towards regaining it. Time-limited reablement services tend to be delivered within a 12-week period with the aim to wrap up services when the older person has met their goal or specific outcome. Time-limited reablement under the CHSP can be delivered by all service types (with the exception of Sector Support and Development).

Time-limited reablement may involve restorative care services where the client has the potential to make a functional gain.

Other time-limited support could include:

- training in a new skill or actively working to regain or maintain an existing skill

- modification to a person's home environment; or
- having access to assistive technology.

Wellness and reablement obligations and supports

As part of applying a wellness and reablement approach assessment organisations should:

- ensure that assessment referrals are targeted towards assisting older people to achieve their agreed realistic goals as outlined in the Support Plan
- apply a 'doing with' instead of 'doing for' approach where possible, offer time limited interventions
- monitor changes in older person needs and regularly review Support Plans
- comply with wellness and reablement reporting requirements; and
- have an implementation plan outlining their organisation's approach to embedding wellness and reablement.

The department has developed online resources to help service providers embed wellness and reablement approaches into their practices and service delivery.

Other resources

Wellness and reablement resources page

Living well at home: CHSP Good Practice Guide provides practical guidance in how to adopt a wellness and reablement approach into service delivery.

Older person scenario – Supporting greater independence[7]

ADELINA is a 77-year-old woman who had a stroke which affected her left side. Her speech was unaffected, but her movement was restricted. She has little function in her left arm - her left leg is slightly affected, requiring her to walk with the assistance of a stick.

Adelina felt that she was unable to do very much for herself. She really wanted to be able to make her own cup of tea, however because of the lack of function in her left arm she felt she was dependent on carers and unable to make a cup of tea between carer visits unless a friend or neighbour came by. Adelina had become resigned that this was how her life would be. She was dispirited and resistant to her son's suggestion that she might do a bit more for herself.

However, at the request of her son, Adelina's Support Plan was reviewed by the assessor who recommended a referral to an occupational therapist. An occupational therapist was engaged under the CHSP who suggested she could be assisted to learn to use the microwave oven, and a kettle fitted onto a tipper so she could make her own tea.

For a number of weeks, Adelina was supported to build up her confidence in her ability to use the microwave and the kettle. After a few months Adelina was able to make meals for herself, her own cup of tea and is living a more independent life. As a result, Adelina said she is feeling more hopeful and has started to invite friends over for a meal.

[7] Wellness Approach to Community Home Care Information Booklet July 2008 produced by the Western Australian Department of Health

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Cont. Adelina's son has been delighted to see his mother's renewed sense of self and independence.

Strategies to assist embedding wellness and reablement

Experience of organisations that have successfully embedded a wellness and reablement approach suggests that there are a number of key drivers for success. These include:

- a whole-of-organisation approach, including commitment from both management and staff
- reflecting wellness and reablement in organisational policy and procedures, especially in recruitment, employment, orientation, induction practices, position descriptions, and performance reviews.
- providing and encouraging staff training and education program
- changing the mindset for management, staff, volunteers, older people and their families and carers
- taking time to work with staff to ensure they understand the benefits and reasons for applying wellness and reablement approaches.
- understanding your organisation's maturity and readiness in terms of wellness and reablement is the first step to embedding the change; and
- ensuring communication materials need to reflect the wellness and reablement approach to assist with setting older person and staff expectations.

Older person scenarios — short-term wellness and reablement, and restorative interventions

DAVID is an 81-year-old man who was referred to My Aged Care following a fall he had two weeks prior. Although he sustained no specific injuries, David was quite shaken following the fall, and now lacked confidence to shower himself independently.

David was referred for an assessment which identified that David was previously independent and was motivated to regain autonomy. The assessor also identified that David was still independent in many daily activities, but was struggling with his personal care.

Based on the assessment, a Support Plan was developed with David which identified his goal of being able to maintain his personal care independently. The support plan provided information on David's strengths and abilities, as well as his areas of difficulty and recommendations to achieve his goals. This included a referral to a CHSP service provider for an occupational therapy assessment, and the delivery of time-limited personal care services.

The occupational therapist used the support plan to work with David and his personal carer to achieve his goals. Initially, personal care services were provided to David three times a week to assist him with showering. Over a four-week period, the CHSP service provider worked with David to develop specific strategies such as how to step in and out of the shower safely, to help him to build his capacity and regain confidence in showering. After four weeks of service David was confident to shower independently again, and the services were withdrawn.

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BILL is a 75 year old man who lives at home with his wife Irene. Bill had not previously received any aged care services since he and Irene had always enjoyed good health. Recently Bill had an accident which had resulted in him spending time in hospital. Although Bill recovered well from his accident, it had left him feeling anxious about leaving the house. Also, his hospital stay and inactivity had reduced his physical fitness, preventing Bill from doing as much around the house and garden as he had done before.

Bill's wife Irene contacted My Aged Care and Bill was referred for an assessment. Bill's assessor worked with him to identify the things that he liked to do and what he no longer felt comfortable doing. A Support Plan was developed with Bill, which included some time-limited interventions with a restorative care focus, including referral:

*to physiotherapy or exercise physiologist (to develop a suitable strength, balance and endurance program)

*to an occupational therapist (to identify energy conservation strategies and/or suitable equipment to promote functional independence)

*for some time-limited home maintenance and domestic assistance.

Following this time-limited support, Bill now feels more confident living at home and has regained much of his former capacity to undertake the home maintenance and domestic chores that he used to do. Applying this short-term restorative care intervention approach enabled Bill to regain his strength and confidence and prevented a possible longer-term dependence on ongoing support services.

Assessment and support planning

The role of the assessor is to work with the older person to identify their needs and concerns, as well as their goals and aspirations. As part of the IAT, the assessment must include the older person's:

- current level of support (formal and informal) and engagement
- carer availability and sustainability
- health concerns and priorities
- functional status
- psychosocial and psychological concerns, and
- home and personal safety considerations.

The assessor then works with the older person to develop a Support Plan which focuses the support needed to assist them to achieve their goals. In developing a Support Plan with an older person, the assessor will:

- Focus on what an older person can do and discuss what they need to complete more difficult tasks, such as breaking down into simpler components.
- Discuss strategies to manage day-to-day tasks (e.g. transport planning to meet goals around the use of public transport to maintain usual activities).
- Explore the older person's opportunity for supporting independence through wellness and reablement approaches (e.g. can the older person benefit from time-limited support and/or the use of specific aids and equipment or home modifications such as installing shower rails to build confidence and independence).

Developing a Support Plan with the older person helps to ensure that it accurately reflects the older person's needs and achievable goals and discusses with the older person the role

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they will need to play to achieve them how they feel about this (motivation). This will increase the likelihood that the older person will be motivated to work towards the goals they have identified, including supporting their independence through wellness and reablement approaches.

In some circumstances, where the assessment has identified that a short-term intervention is appropriate, the assessment organisation is required take on a coordination role to ensure that all referrals in the Support Plan are linked to one or more service providers and that they will all be delivered within an agreed time frame.

For older people receiving wellness and reablement support, assessors should include review dates on the older person's Support Plan to monitor the older person's progress towards their goals and desired outcomes. The need for ongoing, or an adjustment in services will also be assessed. In these circumstances, CHSP service providers should provide time limited services in line with your Support Plan.

Older person scenario – wellness and reablement-focused assessment with support planning

CECELIA is an 81-year-old woman who lives alone. Before experiencing a stroke earlier in the year, Cecelia had been actively involved in her church and local community. However, following the stroke, Cecelia stopped going out on her own, fearing that her poor balance could result in a fall. Within her house she had also cut down on the heavier housekeeping tasks like vacuuming, large cleaning jobs, laundry and gardening.

Cecelia was referred to My Aged Care by her doctor and following the initial registration process and triage, a face-to-face assessment was organised. Cecelia's assessment helped to identify her strengths and capabilities as well as her needs. The resulting support plan was centred around Cecelia's own goals which included getting stronger, resuming her church activities, doing more about the house and getting back out in the garden. Cecelia's support plan included:

* referral to an allied health professional to assist with her goal of getting stronger,
* referral to a CHSP domestic assistance service provider to provide assistance with the more difficult household chores and to help Cecelia to identify which chores she could still manage to do on her own,
* assistance to identify and make contact with a pastoral care team member to discuss her continued interest in participating in church activities, and
* referral to a home maintenance service for discussion and planning to convert her garden to be safer and more accessible, and lower maintenance.

After mastering basic strength and balance exercises through a home exercise program designed by the allied health professional, Cecelia was eventually able to walk unaided inside her home. A more confident Cecelia then arranged a 'buddy' to drive her to and from church activities. At the same time, the CHSP domestic assistance service provider worked with Cecelia to assist her to take on some of the easier housekeeping chores enabling her to remain more active and independent. Cecelia was also delighted to find that the new raised garden beds enabled her to access and maintain her garden more safely without affecting her enjoyment of the garden.

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APPENDIX G – Aged care assessment workforce credentials

Assessment organisations must ensure their workforce has the appropriate training, skills and credentials to provide aged care needs assessments and related services. The below table lists the workforce credentials requirements for key roles within Assessment organisations referenced in Chapter 2. Training requirements for each role are detailed in the My Aged Care Workforce Learning Strategy.

Table 67. Aged care assessment workforce credentials and training requirements

Role	Minimum qualification requirements
Triage Delegate	• Tertiary* – in a health-related discipline directly related to health, aged care or related specialist area. E.g. registered nurses, medical officers, occupational therapists, physiotherapists and social workers. • Current unrestricted registration with the Australian Health Practitioners Regulation Agency (AHPRA) or part of or eligible to be part of a relevant professional association. • at least one years' Aged Care Needs Assessment experience preferred. **Additional qualifications recognised for Aboriginal and Torres Strait Islander Assessment Organisations** • Aboriginal and Torres Strait Islander Health Practitioners with a Diploma of Aboriginal and/or Torres Strait Isander Primary Health Care Practice and is registered with the Aboriginal and Torres Strait Islander Health Practice Board of Australia • Allied Health Assistants with a Diploma or above qualification in Allied Health Assistance and holds or is eligible for a Practising Member (certified) membership with the Allied Health Assistant's National Association • Exceptions to the above qualifications may apply in certain circumstances, including (but not limited to) when the role is located in a remote area. Where an exception applies, a business case must be supplied to the Department for consideration. .

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Role	Minimum qualification requirements
Clinical Assessment Delegate	• Tertiary* – in a health-related discipline directly related to health, aged care or related specialist area. E.g. registered nurses, medical officers, occupational therapists, physiotherapists and social workers. • Current unrestricted registration with the Australian Health Practitioners Regulation Agency (AHPRA) or part of or eligible to be part of a relevant professional association. • At least one years' Aged Care Needs Assessment experience preferred. **Additional qualifications recognised for Aboriginal and Torres Strait Islander Assessment Organisations** • Aboriginal and Torres Strait Islander Health Practitioners with a Diploma of Aboriginal and/or Torres Strait Isander Primary Health Care Practice and is registered with the Aboriginal and Torres Strait Islander Health Practice Board of Australia • Allied Health Assistants with a Diploma or above qualification in Allied Health Assistance and holds or is eligible for a Practising Member (certified) membership with the Allied Health Assistant's National Association .
Non-Clinical Assessment Delegate	• No minimum qualification. Current work experience in aged care or Aged Care Needs Assessment preferred. • At least one years' Aged Care Needs Assessment experience preferred.

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Role	Minimum qualification requirements
Clinical Aged Care Needs Assessor	• Tertiary* – in a health-related discipline directly related to health, aged care or related specialist area. E.g. registered nurses, medical officers, occupational therapists, physiotherapists and social workers. • Current unrestricted registration with the Australian Health Practitioners Regulation Agency (AHPRA) or part of or eligible to be part of a relevant professional association. • Minimum of one year demonstrated experience in Australia or overseas directly delivering services in aged care settings and/or to aged persons (such as geriatric evaluation, rehabilitation, palliative care, community nursing), including to people living with dementia. Note: An Enrolled Nurse may be considered for a clinical assessor role *only if they are under direct or indirect Registered Nurse supervision within the same organisation.* A business case is required. Aboriginal and Torres Strait Islander Health Practitioners with a Cert IV in Aboriginal and Torres Strait Islander Primary Health Care Practice may be considered for a clinical aged care needs assessor provided they are operating within their scope of practice. A business case is required for mainstream Single Assessment System organisations. **Additional qualifications recognised for Aboriginal and Torres Strait Islander Assessment Organisations** • Diploma of Aboriginal and/or Torres Strait Islander Primary Health Care Practice and is registered with the Aboriginal and Torres Strait Islander Health Practice Board of Australia. • a Cert IV or above in Allied Health Assistance and holds or is eligible for a Practicing Member (Certified) class of membership with the Allied Health Assistants' National Association
Non-Clinical Aged Care Needs Assessor	• No minimum qualification. Previous knowledge or work experience in the aged care system preferred.

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Role	Minimum qualification requirements
Aged Care Needs Assessment Team Leaders	• Tertiary* – in a health-related discipline directly related to health, aged care or related specialist area. E.g. registered nurses, medical officers, occupational therapists, physiotherapists and social workers. • Current unrestricted registration with the AHPRA or part of or eligible to be part of a relevant professional association. • At least one years' experience as a Clinical Aged Care Needs Assessor preferred. **Additional qualifications recognised for Aboriginal and Torres Strait Islander Assessment Organisations** • Cert IV or higher qualification in Aboriginal and Torres Strait Islander Primary Health Care Practice • an Enrolled Nurse under the supervision of a Registered Nurse may be considered for the Team Leader role.
Workplace Trainer	• At least one years' experience as an Aged Care Needs Assessor and as listed in the My Aged Care Workforce Learning Strategy. and/or • Training qualifications (such as a Cert IV or higher in training and assessment) or Bachelor degree in education, or higher.
Administrators (e.g. organisational and/or outlet administrators)	• At least three months' experience in aged care or Aged Care Needs Assessment preferred.
Contract Manager	Nil specified
Assessment Organisation Operational Manager	Nil specified
Administration Officer	Nil specified
Delegate Support	Nil specified

*Suitable tertiary qualifications are those that:

- Are relevant to health and/or aged care, and
- Have a practical component (i.e. clinical practice/practicum placement hours), and
- Include subjects that assess function/mobility, such as anatomy physiology, and/or health and wellbeing

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APPENDIX H – AT-HM terms

Table 68. AT-HM terms and definitions

Term	Definition
Tier indicator	Item which aligns with an older person's function and home environment.
Mild/Minimal	Minor, infrequent and no significant impact.
Moderate	Medium, regular and has some impact.
Significant:	Considerable, frequent and complex with serious impact.
Progressive condition:	A medical condition that worsens over time, resulting in a range of limitations in function which can affect quality of life, daily living and community activities. (The 13 conditions listed below are all eligible AT-HM progressive conditions under SaH). These conditions include: • Cerebral Palsy • Epilepsy • Huntington's Disease • Motor Neurone Disease (MND) noting different phenotypes require different management • Multiple Sclerosis (MS) • Parkinson's Disease • Late effects of Polio • Spinal Cord Injury • Spinal Muscular Atrophy • Stroke • Acquired Brain Injury noting different types of brain injury require different management • Muscular Dystrophies and Muscular Atrophies.

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Integrated Assessment Tool (IAT)

User guide

VERSION 2.4 | November 2025

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Introduction

IAT overview

The Integrated Assessment Tool (IAT) is the new assessment tool for older Australians who are seeking to access government subsidised aged care services.

The IAT has been in operation since 1 July 2024.

IAT development

The IAT builds on the previous National Assessment and Screening Form (NSAF) and learnings from the two trials of previous IAT prototypes in 2022 and 2023.

Structure

The IAT has three components:

- Triage – a process to determine priority of assessment needs for senior Australians;
- Assessment – an assessment of aged care needs for senior Australians; and
- Support plan – a summary of assessment findings, goals and recommendations.

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Triage	Assessment	Support Plan
1. Triage details 2. Reason for assessment 3. Current access to services 4. Function 5. General health 6. General wellbeing and safety 7. Advice for assessment	1. Assessment details 2. Reason for assessment 3. Carer profile 4. Function 5. DEMMI modified 6. Medical and medications 7. Physical, personal health and frailty 8. Social 9. Cognition 10. Behaviour 11. Psychological 12. Home and personal safety 13. Financial or legal 14. Support considerations	• Identified needs • Assessment Summary • Goals and recommendations • Associated people • Support plan review

IAT user guide

Purpose

The IAT user guide outlines what Aged Care Needs Assessors (referred to as assessors in this document) in the My Aged Care assessment workforce are required to consider and record when undertaking a home support assessment or comprehensive assessment using the IAT.

References to ‘non-clinical assessors’ and ‘clinical assessors’ in this document are made to address specific instances relating to clinical questions that require clinical attendance.

Further information on clinical attendance is at section 5.5.1 of the My Aged Care Assessment Manual.

The user guide complements other resources available to assessors on the Department of Health and Aged Care's website, including:

- The My Aged Care Assessment Manual;
- The Aged Care Quality Assessment Framework;
- My Aged Care fact sheets; and
- My Aged Care quick reference guides.

Viewing the IAT user guide

The IAT user guide has been designed to be viewed on Microsoft Word, as a PDF or as a hard-copy printed version in colour.

Note: it will be difficult to read and accurately follow this guide if printed in black and white.

Navigating the IAT user guide

Guidance information in this user guide on triage questions, assessment questions, and support plan fields is provided in a consistent structure. The below table provides a breakdown of this structure.

Breakdown	Detail
Topic (question or field)	The exact wording of a question or field as it will appear in the My Aged Care Assessor Portal, the Assessor App or elsewhere.
Response options	The option/s available to an assessor to respond to the topic.
Question rules	To indicate if a question is categorised as: Base question for all assessors These questions are threshold questions which may prompt the completion of Validated Assessment Tools or question sets that require clinical judgement. If these questions are prompted by an assessor who only holds a non-clinical assessor role in the My Aged Care Assessor Portal they will need to be completed with the involvement of a clinical assessor in accordance with their organisation's clinical governance framework and standard operating procedures. A supervising clinical assessor can be selected at any point before finalising the IAT.

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These questions denote the use of Validated Assessment Tools and question sets that are only available to clinical assessors.

Question for assessors with experience working with First Nations clients1

The guidance information for the question will also be shaded a colour based on the above categories.

Pre-populated information

If the response is pre-populated from screening or triage, and/or if the response will be used as pre-populated input in the support plan.

Note: this does not cover the option to pre-populate fields in the IAT from a client's previous NSAF assessment. Instead, Appendix B includes a summary of the pre-population of an IAT assessment from a previous NSAF assessment.

Response guidance

Considerations for assessors when responding to the question or field. Response guidance will be broken down into:

- Context of the question or field;
- What assessors should consider and record when addressing the question or field;
- Question prompts and/or observations to assist assessors during assessments (if relevant and appropriate in the situation);
- Any recommendations associated with responses to the question or field (if relevant); and
- Support resources related to the question or field that may assist the assessor during an assessment (if relevant).

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[1] For example, assessors who have undertaken cultural safety training recognised by a reputable First Nations organisation, and have extensive experience working with First Nations people of Australia. For clarity, the cultural safety overview and guidance in My Aged Care training on MAClearning does not provide training in the use of relevant validated tools for First Nations clients.

IAT User Guide Table of Key changes

Document Version	Description of Change	Section
Version 2.3 – November 2025		
V2.3	Triage: Triage questions will no longer be mandatory if an assessment is flagged for the End-of-Life Pathway	Page 11
V2.3	Additional Triage question: Does the client require urgent service provision (direct to service)?	Page 51
V2.3	Health conditions: additional guidance relating to coding for progressive conditions	Page 90
V2.3	Vision concerns: option for 'other' is removed	Page 210
V2.3	Vision concerns: Additional guidance on recording information on guide dogs for the AT-HM scheme	Page 211
V2.3	Hearing concerns: option for 'other' is removed	Page 212
V2.3	Somatosensory: option for 'other' is removed	Page 214
V2.3	Swallowing: Do you have any problems with swallowing causing difficulties when you eat or drink: option for 'other' is removed	Page 217
V2.3	Client Diversity: Guidance on recording 'care leavers'	Page 353
V2.3	Additional Support Consideration question: 'Does the client require urgent service provision?'	Page 356
V2.3	Additional Support Plan guidance content	Page 358 onwards
V2.4	Updated IAT outcome guidance	Page 371

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Acknowledgements

The Department of Health and Aged Care wishes to thank members of the My Aged Care assessment workforce's Lead Educators' Network (LEN) on IAT training for their advice and input that supported the development of this user guide.

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Triage section

The purpose of triage, and the triage section of the IAT, is for an assessment organisation to validate the appropriateness of a received assessment referral and to collect information relevant to assist with the assessment process.

NB: All mandatory triage questions will be optional if it is an End-of-life Pathway.

Triage details

Question: Date of triage	
Response options	Select date of triage from calendar
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • Triage is a process undertaken by a team lead role (the role type in My Aged Care) to validate the appropriateness of an assessment referral received. Triage is completed on system by completing triage questions after an assessment referral is accepted. • Note that Team Leaders will have the ability to convert the referral from/to a Home Support/Comprehensive Assessment once Triage has been completed. Record: • The date that the triage questions were completed with the client or their support person.

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Question: Registration screen information collected from	
Response options	• Client • Client's carer, family member and/or other • Client's representative • Client's general practitioner • Representative of service provider • Health professional • Aboriginal liaison officer • Aged care connector and coordinator

Question: Registration screen information collected from	
	• Care finder • Via interpreter • Agent • Other – please specify
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from screening instrument if completed (field on if client is currently receiving any formal assistance or support)
Response guidance	<u>Context:</u> • This refers to the person(s) or organisation(s) information is collected from at the time of triage. • In most instances, it will be the client. <u>Consider and record:</u> • In instances that information is not provided by the client, document the name of the person(s) providing the information. • If an interpreter is used. • Ensure you have consent from the client for information to be provided on their behalf. • Consider whether the person(s) should be established as a Representative or Relationship for the client, if they are not already.

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Question: Is the client currently an admitted hospital in patient?	
Response options	• No • Yes
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • If the response is 'yes', the response will pre-populate in reason for assessment section (circumstances triggering contact question)
Response guidance	<u>Context:</u>

Question: Is the client currently an admitted hospital in patient?	

	• The triage person should indicate if the client is currently an admitted hospital in-patient when triage is undertaken.
	• Hospital in-patient settings include:
	  ○ Public or private hospital; or
	  ○ Other hospital settings (excluding acute care) where the client is an admitted patient. Examples include:
	  ▪ Overnight care; or
	  ▪ Extended care or rehabilitation facilities or other non-acute wards/beds in hospital (including HITH).
	
	Consider and record:
	
	• If the client is in an in-hospital setting during triage.
	
	Prompts:
	
	• Where are you currently located?
	• How long are you expected to stay in hospital for?

Question: Assessor notes	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	Yes: • The response will pre-populate in assessment details section of IAT (question on assessor notes)
Response guidance	Context: • Any notes from the previous questions on the date of the client's triage and if the client is an admitted hospital in-patient. • This notes field can also be used for information on contact details identified during triage. Consider and record: • If the client is in an in-hospital setting during triage but is expecting to be at home for an assessment. • If there were any difficulties contacting the client for triage.

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Question: Assessor notes	
	• Who triage was undertaken with, if not the client. • Preferred contact details if needed prior to the assessment (for example, if the client is difficult to contact by telephone). • Any communication difficulties, or related challenges, identified during triage that the assessor should be aware of before the assessment. • Complete the question based on information available, information on the inbound referral or information provided by another source such as a representative, carer or friend.

Reason for assessment

Question: What is the key circumstance that has triggered client/representative making contact?	
Response options	• Referral from health professional • Hospital discharge • Fall(s) • Medical condition(s) • Difficulties with activities of daily living • Change in caring arrangements • Change in care needs • Change in living arrangements • Change in cognitive status • Change in mental health status • Other
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate in reason for assessment section of IAT (circumstances triggering contact question)
Response guidance	Context: • The triage person should determine the situation or trigger that has led the client to contact My Aged Care. The assessment type can be changed after triage, but only from Home Support to Comprehensive. • Note that assessors can self-refer a client, however this will be limited to four reasons: 1. In-hospital

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Question: What is the key circumstance that has triggered client/representative making contact?	
	2. First Nations 3. Remote Assessment 4. Homeless (or at risk of) 5. Vulnerable groups 6. End-of-Life Pathway Consider and record: • Determine the key situation or trigger that has prompted the contact based on any of the following: ○ Information on the inbound referral; ○ Information provided by another source such as a representative, carer or friend; and/or ○ Your judgement based on the conversation with the client. Prompts: • Use the below definitions to assist with the response. ○ **Referral from health professional or assessor:** if the client has been referred by a health professional to undertake an assessment and/or to seek aged care services. ○ **Hospital discharge:** If the client has had a recent hospitalisation. ○ **Fall(s):** If the client has had a fall. ○ **Medical condition(s):** If the client has medical conditions that are impacting on their ability to undertake day-to-day tasks. ○ **Difficulties with activities of daily living:** If the client is finding it difficult to undertake day-to-day activities. ○ **Change in care needs:** If the client needs more (or less) assistance to complete everyday tasks. ○ **Change in living arrangements:** If the client has relocated to new accommodation (by choice or forced relocation), is now homeless, has a co-resident carer that moves out of their home or a carer/support person moves into their home. ○ **Change in cognitive status:** If the client or their carer mentions that the client has experienced a change in their memory and cognition. This can include declining memory, short-term memory, poor memory, safety concerns with being left alone or

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Question: What is the key circumstance that has triggered client/representative making contact?	
	using cooking appliances, forgetting to take medication or taking the wrong medication, getting lost in familiar environments and concerns about safety when driving. ○ **Change in mental health status**: if the client has had a negative impact on their mental health and may need more assistance with managing their mental health. ○ **Other:** For any responses that are not defined in this guidance. Include relevant information if this response is chosen. • If there is more than one key trigger or situation, select and include details in the other response option.

Question: Assessors comments about trigger	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • Any relevant notes on why the client has contacted My Aged Care and been referred for an assessment. Consider and record: • Information that could be included in this response includes: ○ Who has made the referral and why? ○ What is concerning the client most about their current situation? ○ How the client has been managing up until now? ○ Opportunities to support the client to remain independent? Prompts: • What do you want to achieve by having this assessment?

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Question: Assessors comments about trigger	
	• Is there anything more that you would like to share on challenges leading up to your referral for an assessment? • What was the 'tipping point' that led to your referral for an assessment? • What has prompted you to make contact with My Aged Care? • Do you feel you need service right now or in the future?

Question: How long has the client experienced this circumstance?	
Response options	• Recent acute illness/event • Gradual increase in needs over time • Long term disability • Other
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Response guidance	<u>Context:</u>
	
	• The triage person should identify how long the client has been experiencing the circumstance/s which have prompted contact with My Aged Care and the referral for assessment.
	• The triage person should ascertain whether this is an acute illness that requires medical intervention before the assessment can proceed, or whether it is a chronic deterioration of a disability or a new disability.
	
	<u>Consider and record:</u>
	
	• Use the below definitions to assist with the response.
	  ○ **Recent acute illness/event:** a condition that is from a recent illness or event that has had a sudden onset for the client.
	  ○ **Gradual increase in needs over time:** the circumstance is the result of increased needs for the client relating to their physical health, emotional wellbeing, home environment and/or support that have gradually increased over time.
	  ○ **Long term disability:** the circumstance is from a permanent or significant disability that affects the client's ability to take part in everyday activities.

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Question: How long has the client experienced this circumstance?	
	○ **Other:** For any responses that are not defined in this guidance. Include relevant information if this response is chosen. • If there are multiple circumstances, select and include details in the free text response option. <u>Prompts and/or observations:</u> • How long have you experienced this challenge? • When did you first start experiencing these difficulties? • Is it an ongoing or short term concern? Has it improved or gotten worse? • Have you sought contact with your GP or another health professional? • What interventions and/or services have been used to date? Do you have any follow up appointments on these interventions?

Question: Comments about circumstance	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	<u>Context:</u> • Any relevant notes on the client's circumstance/s which have prompted contact with My Aged Care and the referral for assessment. <u>Consider and record:</u> • A summary of the circumstance/s being experienced by the client. • How they are currently managing the circumstance/s, and if this is sustainable. • What are the main concerns for the client relating to the circumstance.

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Question: Comments about circumstance	
	• If the client is in a suitable situation for an assessment, or are they too unwell. • Any other information about the reason for the referral. <u>Prompts:</u> • Do you mind sharing some more information on the challenge/s that you are dealing with? • What are you finding most difficult to manage? <u>Recommendations:</u> • A reablement focus may be appropriate for clients experiencing a condition from a recent acute illness/event.

Current access to services

Question: Are you currently receiving any aged care services?	
Response options	• No • Not sure • Yes
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from screening instrument if completed (field on if client is currently receiving any formal assistance or support)

Response guidance	<u>Context:</u>
	
	• The triage person should determine whether the client is currently receiving any aged care services that is government funded and/or privately funded.
	• This only relates to funded aged care services, and not support that is provided to the client by a carer (i.e. family member or similar support person).
	• An aged care service is support provided to older people who need help in their own home or who can no longer live at home. It can include:
	  ○ Help with everyday living;
	  ○ Assistive equipment and home modifications;
	  ○ Personal care and health care; and

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Question: Are you currently receiving any aged care services?	
	○ Accommodation • Support provided to the client by a carer is not considered a funded aged care service even if the carer receives a Carer Payment from Services Australia. <u>Consider and record:</u> • If the client is currently receiving any assistance to deal with any challenges or circumstances flagged in the reason for assessment. • An aged care service is a service that is <u>aimed</u> at older people. It does not include services that are aimed at the general community (i.e. a supermarket's delivery service). • Select 'not sure' if it is not clear if the service is aimed at older people or conflicting information is shared. <u>Prompts:</u> • Are you currently receiving any help? • What help are you currently getting? • Are your services privately funded or government funded? • Do you have a health care plan with your GP that you are accessing allied health through? • Do you get any other assistance around the house other than what is provided by your carer? • Have you ever received aged care services before? Have you stopped receiving these services?

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Question: What aged care services are you currently receiving?	
Response options	Textbox for written response
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • Response will pre-populate from screening instrument if completed (field on details of any formal assistance or support that client is receiving)
Response guidance	<u>Context:</u> • Any relevant notes on aged care services currently being received by the client.

Question: What aged care services are you currently receiving?	
	• This question aims to collect all information about current formal supports to assist in clarifying the immediate unmet needs of the client. Consider and record: • If the aged care services are privately funded or government funded. • If the aged care services are needed because of carer factors (for example, limitations in the support that are carer can provide). • The frequency the aged care services are provided. • If the client has any service referral codes in place that they are not using. Prompts: • Can you share some more details on the formal assistance you are currently receiving? • Do you pay for these services out of your own pocket? • How often do you receive these services? • Are the services short-term or long-term? Recommendation: • Assistance with 'finding a provider' for any service referral codes that are not being used. Support resources: • About aged care | Australian Government Department of Health and Aged Care • Find a non government-funded provider | My Aged Care

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Function

Question: Are you able to walk?	
Response options	• Yes • No • Somewhat
Question rules	**Base question** that is mandatory to complete

Question: Are you able to walk?	
Pre-populated information	Yes: • The response will pre-populate from screening instrument if completed (field on if client is able to walk) • The response will pre-populate in function section of IAT (ability to walk question)

Response guidance	<u>Context:</u>
	• The triage person should identify whether the client can walk. Consider difficulties with indoor, outdoor and community mobility.
	<u>Consider and record:</u>
	• Consider difficulties around the home (indoors and outdoors) or away from home (community mobility).
	• Use the below definitions to assist with the response.
	  ○ **Yes:** the client walks with no walking aids or is independent with mobility using a walking stick.
	  ○ **No:** the client is wheelchair bound and is unable to self-propel, is bed bound or needs assistance of more than one person to mobilise.
	  ○ **Somewhat:** the client:
	  ▪ Uses a walking stick but it is not meeting their needs and the client is at risk of falling;
	  ▪ Walks with the assistance of one other person and/or uses a walking frame, crutches or aids that require the use of both arms;
	  ▪ Walks with a quad stick or one crutch and is reliant on this aid for mobility at all times;
	  ▪ Has foot problems (such as overgrown/ingrown toenails, calluses, bunions, amputations) that impact on their ability to walk;
	  ▪ Has breathing problems and/or uses oxygen that impacts on and limits their mobility to walk; and/or
	  ▪ Uses a wheelchair without the help of others (able to self- propel a manual wheelchair or use an electric wheelchair).
	<u>Prompts:</u>
	• Do you have any problems with walking?
	• Is walking a concern?

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Question: Are you able to walk?	
	• Has there been any recent falls?

Question: Are you able to take a bath or shower?	
Response options	• Yes • No • Somewhat
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from screening instrument if completed (field on if client is able to take a bath or shower) • The response will pre-populate in function section of IAT (able to take a bath or shower question)
Response guidance	<u>Context:</u> • The triage person should identify if a client requires assistance, supervision or prompting from another person to shower, bath or bathe themselves. • This question does not relate to grooming as this is covered under a separate question. <u>Consider and record:</u> • Consider cognitive as well as physical reasons. A client with dementia may be physically able to shower, but may require prompting by their carer. • Use the below definitions to assist with the response. ○ **Yes:** the client is able to prepare for and shower/dry themselves, including with the use of grab rails and adaptive equipment. This includes managing to bath, shower and dry themselves independently as often as they require without additional physical, verbal or standby assistance. ○ **No:** the client needs total assistance with preparing and washing/drying themselves; utilises bed sponges only. ○ **Somewhat:** the client needs help getting in or out of the bath/shower. This includes: ▪ Hands-on assistance, supervision or prompting of one person when getting in and out of the shower or bath, on and off

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Question: Are you able to take a bath or shower?	
	equipment such as a bath chair, assistance with washing and drying, difficulty regulating water temperature; ▪ If a client is anxious regarding showering/bathing and requires standby assistance only; and/or ▪ If they use equipment and require help to transfer on/off or to use any of the equipment. <u>Prompts:</u> • Are you able to bathe and shower yourself? • Is there any problems with bathing and showering? • Do you have equipment/aids in place to assist with bathing and showering? • Do you have informal/informal arrangements, and are they working and sustainable?

Question: Are you able to transfer yourself from a chair, bed etc?	
Response options	• Yes • No • Somewhat
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from screening instrument if completed (field on if client is able to transfer) • The response will pre-populate in function section of IAT (able to transfer question)
Response guidance	<u>Context:</u> • The triage person should identify whether a client is physically able to move from place to place and includes difficulties with all types of transfers. <u>Consider and record:</u> • Whether a client is physically able to move from place to place and includes difficulties with all types of transfers. For example, is the client able to:

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Question: Are you able to transfer yourself from a chair, bed etc?	
	○ Maintain or change body position; ○ Carry, move and manipulate objects; and/or ○ Get in or out of bed or a chair (including wheelchairs), in/out of a car? • Use the below definitions to assist with the response. ○ **Yes:** the client is able to transfer safely without help from a person or aid. ○ **No:** the client is completely unable to transfer themselves and/or has no sitting balance. The client is reliant on others or the use of a hoist/pat slide to transfer. ○ **Somewhat:** the client requires assistance with transfers. This includes: ▪ Requires verbal or physical prompting from a person to transfer; ▪ Requires assistance from one or two people to transfer; and/or ▪ May use an aid such as a toilet raise; bed stick; chair platform or the use of a hoist, standing and raising aids, handi-lift/walk belt. <u>Prompts:</u> • Can you get on and off objects? (bed, chair etc.) • Do you have any problems or difficulties with transfers? • Do you have any equipment/aids in place to assist with transfers? • Is there anything that you think you need to assist with transfers?

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Question: Are you able to dress yourself?	
Response options	• Yes • No • Somewhat
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from screening instrument if completed (field on if client is able to dress) • The response will pre-populate in function section of IAT (ability to dress question)

Question: Are you able to dress yourself?	

Response guidance	Context:
	
	• The triage person should determine the client's ability to get dressed in their clothes.
	
	Consider and record:
	
	• Consider cognitive as well as physical reasons. A client with dementia may be physically able to dress, but may require prompting to do so, or a carer may also need to physically assist a client who is unable to 'sequence' their dressing tasks.
	• Use the below definitions to assist with the response.
	  ○ **Yes:** the client is able to choose their clothing and is appropriately dressed, is able to do up their own buttons, zips, laces and/or put on their shoes/socks/stockings etc.
	  ○ **No:** the client is completely unable to dress themselves.
	  ○ **Somewhat:** the client is able to dress with some assistance and/or prompting. This may include assistance to choose clothing, or to do up their own buttons, zips, laces and/or put on their shoes/socks/stockings etc. This also includes the use of aids or equipment to assist.
	
	Prompts and/or observations:
	
	• Can you dress yourself?
	• Do you have any problems with getting dressed?
	• Do you have any assistance in place with getting dressed?
	• Does the assistance you receive meet your needs?

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Question: Are you able to get to places out of walking distance?	
Response options	• Yes • No • Somewhat
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from screening instrument if completed (field on if client is able to get places)

Question: Are you able to get to places out of walking distance?	
	• The response will pre-populate in function section of IAT (able to get places out of walking distance question)

Response guidance	<u>Context:</u>
	
	• The triage person should determine if the client can get to places out of walking distance (i.e. how does the client get around away from home).
	• This question is not used to consider the mode of transport a client uses, but whether they need physical assistance or supervision from another person with using public transport, getting to and from places away from home, and driving.
	
	<u>Consider and record:</u>
	
	• Consider cognitive as well as physical reasons for requiring assistance.
	• Use the below definitions to assist with the response.
	  ○ **Yes:** if the client can travel alone on business, taxis (including organising taxis independently) or drive their own car.
	  ○ **No:** if the client is completely unable to travel unless emergency arrangements are made for a specialised vehicle like an ambulance. The client requires assistance of more than one person or is not able to travel at all unless using emergency transport.
	  ○ **Somewhat:** if the client can only do so in some circumstances. These circumstances could include:
	  ▪ If they require assistance from a person (informally or formally); and/or
	  ▪ If they possess a restricted driver's licence and are unable to attend appointments that are out of their restricted driving distance/local area.
	
	<u>Prompts:</u>
	
	• Are you able to travel around away from home?
	• Do you have any problems with travelling around away from home?
	• Do you have any assistance in place with travelling around away from home?
	• Does the assistance you receive meet your needs?

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Question: Are you able to undertake housework?	
Response options	• Yes • No • Somewhat
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from screening instrument if completed (field on if client can do housework) • The response will pre-populate in function section of IAT (able to undertake light housework question)

Response guidance	<u>Context:</u>
	• The triage person should identify whether the client can undertake light housework tasks around their house.
	• This question focuses on light housework tasks only. A separate question will also be asked during the assessment about the client's ability to undertake more difficult housework tasks.
	
	<u>Consider and record:</u>
	• Consider the client's ability to do cleaning, vacuuming, washing, change bed linen and other general house-keeping tasks.
	• Use the below definitions to assist with the response.
	  ○ **Yes:** the client can maintain house-keeping tasks independently. For example, washing floors, vacuuming, changing bed linen etc.
	  ○ **No:** the client is unable to participate in any housekeeping tasks.
	  ○ **Somewhat:** the client can do light housework but may need help with heavy work. Light housework includes dusting, dishwashing, washing clothes, cleaning out the fridge etc. Heavy housework includes removing the vacuum from the cupboard, changing the sheets on a bed etc.
	
	<u>Prompts:</u>
	• Are you able to undertake light housework?

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Question: Are you able to undertake housework?	
	• Do you have any problems with undertaking light housework • Do you have any assistance in place with housework? • Does the assistance you receive meet your needs?

Question: Are you able to shop for groceries on your own?	
Response options	• Yes • No • Somewhat
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from screening instrument if completed (field on if client is able to go shopping for groceries) • The response will pre-populate in function section of IAT (able to go shopping question)

Response guidance	<u>Context:</u>
	• The triage person should identify whether the client can go shopping for groceries or clothes, assuming they are able to get to the shops.
	
	<u>Consider and record:</u>
	• Consider the client's ability to travel the distance required; to select and carry items (vision, reaching/bending ability) as well as cognition.
	• Use the below definitions to assist with the response.
	  ○ **Yes:** the client can take care of all their shopping needs themselves once they are at the shops, or undertake online shopping.
	  ○ **No:** the client is completely unable to participate in any shopping activities.
	  ○ **Somewhat:** the client needs someone to go with them on all shopping trips as they are unable to attend the shops themselves and need to be accompanied due to difficulty paying, reading labels, reaching and/or bending for items. This includes providing another person with a shopping list that they have prepared.

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Question: Are you able to shop for groceries on your own?	
	Prompts: • Are you able to go shopping? • Do you have any problems with shopping? • Do you have any assistance in place with shopping? • Does the assistance you receive meet your needs?

Question: Are you able to drive or take public transport?	
Response options	• Yes • No • Somewhat
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Response guidance	Context:
	
	• The triage person should identify whether the client can drive a car or take public transport independently.
	
	Consider and record:
	
	• Consider the client's ability to drive or take public transport.
	• Use the below definitions to assist with the response.
	  ○ **Yes:** the client can take a bus (or other forms of public transport), taxi or car independently.
	  ○ **No:** the client needs specially modified vehicles.
	  ○ **Somewhat:** the client is able to drive or take public transport if somebody goes with them.
	
	Prompts:
	
	• Are you able to drive?
	• Do you ever catch public transport?
	• How comfortable do you feel driving?
	• Do you need help to catch public transport?

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Question: Are you able to prepare meals?	
Response options	• Yes • No • Somewhat
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from screening instrument if completed (field on if client is able to prepare meals) • The response will pre-populate in function section of IAT (able to prepare meals questions)
Response guidance	<u>Context:</u> • The triage person should identify whether the client can prepare their own meals, including the delivery of prepared meals, help with meal preparation and managing basic nutrition. <u>Consider and record:</u> • Consider cognitive as well as physical issues. • Use the below definitions to assist with the response. ○ **Yes:** the client is able to plan and cook full meals themselves. This includes heating pre-prepared meals for convenience. ○ **No:** the client is completely unable to participate in any activities associated with meal preparation. ○ **Somewhat:** the client can prepare some things but they are unable to cook full meals themselves. For example, they are able to prepare cups of tea and coffee with toast/biscuits, light meals such as sandwiches, heating/reheating pre-prepared meals. <u>Prompts:</u> • Are you able to prepare meals? • Do you have any problems with preparing meals? • Do you have any assistance in place with preparing meals? Does the assistance you receive meet your needs?

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Question: Are you able to go to the toilet, wipe and re dress?	
Response options	• Yes • No • Somewhat
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from screening instrument if completed (field on if client is able to go to the toilet) • The response will pre-populate in function section of IAT (go to toilet, wipe and re-dress questions)
Response guidance	<u>Context:</u> • The triage person should understand the client's ability to go to the toilet, wipe and re-dress. <u>Consider and record:</u> • Consider cognitive as well as physical reasons. A client with dementia may be physically able to toilet, but may require prompting. Any issues with incontinence may also be recorded here. • Use the below definitions to assist with the response. ○ **Yes:** the client is independent with all toileting tasks ○ **No:** the client is completely unable to manage toileting without help. ○ **Somewhat:** the client needs some help with toileting tasks. This includes assistance to: ▪ Move on and off the toilet, un/dressing, wiping ▪ Manage continence aids, if incontinent ▪ Manage catheter or ostomy, if present ▪ Manage personal hygiene needs post toileting. <u>Prompts and/or observations:</u> • Can you wipe yourself effectively after using the toilet? • Do you need assistance to wipe yourself?

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Question: Summary of function notes	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	Yes: • The response will pre-populate in function section of IAT (summary of function notes question)

Response guidance	<u>Context:</u>
	• Any notes from the previous questions on the client's function.
	• A holistic summary of:
	  ○ The client's level of function.
	  ○ The impact on activities of daily living.
	  ○ Any unmet needs.
	  ○ The services and supports required for the client to remain living independently.
	• This could also include any information on other functional limitations that were raised by the client when answering triage questions on function.
	
	<u>Consider and record:</u>
	• The activities the client can do, what activities they receive support with, and whether this support is formal or informal.
	• List of current services in place, unmet needs, relevant discussions with the refer, and anticipated outcomes of the assessment.
	• If there was any conflicting information shared in response to the previous function questions (e.g. if the client and a support person had different views to each other).
	• Any additional information on the client's other functional abilities that were identified when discussing triage questions on function.
	  ○ This includes if the client has voluntarily shared any toileting issues they are facing, noting this is covered under the function section of the section.
	• This refers to a summary of the client's functionality ability. Questions relating to a client's function are used to identify the client's strengths and any difficulties they may have in completing activities of daily living. This summary of function is an opportunity for assessors to holistically

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Question: Summary of function notes	
	summarise the client's level of functioning and how this impacts on all activities of daily living. Prompts: • Do you have any challenges or concerns about your ability to undertake day-to-day activities? • Are there any specific concerns with your day-to-day activities that you would like to discuss in more detail with your assessor?

General health

Question: How much have health issues affected your normal activities (outside and/or inside the home) during the past 4 weeks?	
Response options	• Not at all • Slightly • Moderately • Quite a bit
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from screening instrument if completed (field on if client has health concerns impacting on independence) • The response will pre-populate in medical and medications section of IAT (impact of health issues on normal activities during past four weeks question)
Response guidance	Context: • The triage person should identify if the client feels that recent health issues are impacting their ability to undertake normal activities. • A health issue is a condition or problem that affects a person's physical, mental or emotional wellbeing. This may include physical illness, mental health concern, chronic conditions and other lifestyle-related challenges. Consider and record:

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Question: How much have health issues affected your normal activities (outside and/or inside the home) during the past 4 weeks?	

	• Consider framing the question as 'the past month' rather than the 'previous four weeks', as this may make the question easier to consider for the client.
	• Use the below definitions to assist with the response.
	  ○ **Not at all**: no change to the client's ability to undertake normal activities in the past four weeks.
	  ○ **Slightly:** a change to one or two of the client's normal activities in the past four weeks, but this is managed by doing things slightly differently.
	  ○ **Moderately:** a change to some of the client's normal activities in the past four weeks, which includes an inability to complete some activities.
	  ○ **A great deal:** an impact on most of the client's normal activities in the past four weeks.
	
	<u>Prompts:</u>
	
	• Has there been a change in your health or normal function during the past four weeks?
	• What does a good day look like? How do you cope on bad days?
	• What have been your hobbies or favourite activities over the last couple of years? Are there any hobbies or favourite activities that you have no longer been able to complete in the past month?
	• Are you able to get out and about in your community? What helps you and what stops you?
	• Are there tasks around the house or away from home that you now find too difficult? Are these recent challenges over the past month?

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Question: Have you had any recent falls or near miss falls in last 4 weeks?	
Response options	• No • Yes • Unsure
Question rules	**Base question** that is mandatory to complete

Question: Have you had any recent falls or near miss falls in last 4 weeks?	
Pre-populated information	Yes: • The response will pre-populate from screening instrument if completed (field on if client has had any falls or near miss falls in last four weeks) • The response will pre-populate in physical and personal health and frailty section of IAT (question on falls or near miss falls in last four weeks)
Response guidance	<u>Context:</u> • The triage person should identify whether the client has had any slips, trips or falls in the past four weeks. • A near miss fall is an event where someone was at risk of falling, but due to timely intervention or luck. <u>Consider:</u> • The number of falls and/or near misses. • The cause of the falls (e.g. a trip, slip, fainting or dizziness). • Contributing factors to the fall (e.g. vision impairment, injury, feet and footwear etc.). • Where the falls occurred. • Whether the client injured themselves or required medical attention/admission to hospital. • If the client's GP is aware of the falls. • If the client has attended a falls clinic. • Whether the client is afraid of falling. • Other circumstances relating to falls or near miss falls. <u>Prompts:</u> • Have you had any slips, trips, falls or near miss falls recently? • When did you last have a fall or a near miss fall? • Do you have any concerns about falls in your current living arrangement? <u>Recommendation</u> • Referral to a GP or a heath professional

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Question: During the past month, has it often been too painful to do many of your day to day activities?	
Response options	• No • Yes • Unsure
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from screening instrument if completed (field on if client has experienced pain or discomfort in past month) • The response will pre-populate in physical and personal health and frailty section of IAT (if it has often been too painful to do day to day activities in past month question)
Response guidance	<u>Context:</u> • The triage person should seek to identify if any bodily pain has impacted the client's ability to undertake their typical day-to-day activities in the past month. • Bodily pain is discomfort or distress experienced in various parts of the body. It can manifest as aching, throbbing, sharp, or dull sensations. • This question is focused on bodily pain. General wellbeing concerns, which could include emotional pain, is covered in triage questions on general wellbeing and safety. <u>Consider:</u> • If the client has recent typical day-to-day activities that they can no longer complete due to bodily pain. • Investigate if these typical day-to-day activities are activities that they were able to do during the past month. • Select 'not sure' if it is not clear if limitation on day-to-day activities is due to bodily pain or if conflicting information is shared. <u>Prompts:</u> • Over the last month, have you become unable to complete some day-to-day activities? • Why have you found it difficult to complete these day-to-day activities?

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Question: During the past month, has it often been too painful to do many of your day to day activities?	
	• Do you find that any pain you experience limits your ability to complete your normal tasks? Are there any recent examples over the past month? Support resources: • Aches and pains | healthdirect

Question: Do you have any weight loss or nutritional concerns?	
Response options	• No • Yes • Unsure
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from screening instrument if completed (field on if client has weight or nutritional concerns)

Response guidance	Context:
	
	• The triage person should identify if the client has experienced any unplanned weight loss or has nutritional concerns.
	• Unplanned weight loss happens when someone loses a significant amount of weight, without deliberately being on a weight loss plan.
	• Unplanned weight loss is likely to lower a person's general wellbeing and quality of life. It can also increase their risk of serious health issues such as hip fracture, poor wound healing and malnutrition.
	
	Consider:
	
	• If the client has experienced any unplanned weight loss or has nutritional concerns. For example:
	  ○ Weight loss without trying may be evidenced by loose clothing, rings or dentures.
	  ○ Poor appetite and/or poor dietary intake for more than two weeks.

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Question: Do you have any weight loss or nutritional concerns?	
	Prompts: • Have you gained or lost weight recently? • Are you worried about weight loss? • Do your clothes feel tighter or looser? • How long have you been at your current weight? • Have any of your friends or family commented on your weight recently? • Have circumstances affected what you eat, how you prepare meals or difficulties with shopping? • How is your appetite? • Can you describe what you have for breakfast, lunch and dinner? • Are you on fluid restrictions? • What is your typical water consumption on a hot day? Recommendations: • Recommendation/referral to GP or dietitian.

Question: General health notes	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	Yes: • The response will pre-populate in physical and personal health and frailty section of IAT (general health notes question)
Response guidance	Context: • Any notes from the previous questions on the client's general health. • This could include details shared on recent health issues, falls, bodily pain or weight/nutritional concerns. Consider and record: • Record succinct summary of the main health issues impacting the client. • Any future relevant details shared on recent health issues, falls, bodily pain or weight/nutritional concerns.

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Question: General health notes	
	• Any concerns raised in in the conversation that did not relate to the questions but do relate to the client's general health. For example, this could be any weight gain issues if they were raised when asking about weight loss or nutritional concerns. Prompts: • Is there anything else on your general health that you would like to discuss with your assessor during your assessment?

General wellbeing and safety

Question: Do you ever feel lonely, down or socially isolated?	
Response options	• No, not at all • Occasionally • Sometimes • Most of the time • Not sure
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from screening instrument if completed (field on if client ever feels lonely, down or socially isolated) • The response will pre-populate in social section of IAT (ever feel lonely, down or socially isolated question)
Response guidance	Context: • The triage person should seek to identify if the client has any concerns about feeling lonely, down or socially isolated. • This refers to whether the client experiences feelings of loneliness, depression or social isolation. • Feelings of being depressed can be expressed as feeling unhappy, 'blue', down, miserable, dejected, low, disheartened or sad. • Responses that may influence this question include the client's medical diagnosis; if they have been sick and had to stay in bed; needed someone to talk to; needed help with daily chores; or needed help taking care of themselves. Other factors that may influence this question include the

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Question: Do you ever feel lonely, down or socially isolated?	

	availability of another person or service provider to assist with daily activities, and the frequency of this support.
	• The response to this question should be based on how the client feels, rather than an assessment of or a consideration of activities they undertake related to their general wellbeing.
	
	<u>Consider and record:</u>
	
	• If the client has indicated they have any concerns about feeling lonely, down or socially isolated.
	• Ask further questions to investigate statements that a client might make regarding feeling sad and lonely. These feelings may become evident in behaviours such as self-neglect, withdrawal from social contact, lack of motivation, constant tiredness, unexplained headaches, changes in digestive or bowel habits and decreased appetite resulting in weight loss, or in some cases weight gain due to overeating.
	• Use the below definitions to assist with the response.
	  ○ **No, not at all:** the client is content with their social situation, and does not ever feel lonely or down.
	  ○ **Occasionally:** the client is content with their social situation, and only occasionally feels lonely or down.
	  ○ **Sometimes:** the client is not content with their social situation, and sometimes feels lonely or down.
	  ○ **Most of the time:** the client is not content with their social needs, and often feels lonely or down.
	  ○ **Not sure:** the client is not sure or is providing conflicting information.
	
	<u>Prompts:</u>
	
	• Do you have any social needs that are unmet?
	• Do you ever feel socially isolated?
	• Do you feel well connected to your friends and family?
	• Do you have any concerns about feeling lonely or down?
	• Ask further questions to investigate statements that a client might make regarding feeling sad and lonely.
	
	<u>Recommendation</u>
	
	• Seek advice from your assessment organisation if you are concerned that the client may have a mental illness and/or be at risk of self-harm

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Question: Do you ever feel lonely, down or socially isolated?	
	Support resources: • Seniors Connected Program | Department of Social Services, Australian Government (dss.gov.au) • Older Australians, Social support - Australian Institute of Health and Welfare (aihw.gov.au) • Getting older and mental health - Beyond Blue

Question: Do you think you have any memory loss or confusion?	
Response options	• No, not at all • Occasionally • Sometimes • Most of the time • Not sure
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from screening instrument if completed (field on if client has memory problems or get confused)
Response guidance	Context: • The triage person should seek to understand if the client has any concerns with memory loss or confusion. • This could include any short-term memory loss where, as an example, a client can remember incidents from 20 years ago but unable to remember details of events that happened 20 minutes ago. Each client may have different time deficits. • This could also include long-term memory less where, as an example, a client can remember details within a short time period but is unable to remember events from their childhood. Each client may have different time deficits. Consider and record: • If the client experiences any memory loss of confusion. This includes any changes to memory and thinking that the client has experienced, or any concerns reported by a support person and/or the referrer. • Use the below definitions to assist with the response.

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Question: Do you think you have any memory loss or confusion?	
	○ **No, not at all**: the client has no memory loss or confusion. ○ **Occasionally**: on rare occasions (for example, once a month), the client has concerns about memory or confusion. ○ **Sometimes:** the client sometimes (for example, one a week) has memory loss or confusion. ○ **Most of the time:** the client regularly (for example, most days) has memory loss or confusion. ○ **Not sure:** the client is not sure or is providing conflicting information. Prompts: • Do you sometimes find it difficult to remember things? • Do you find it easy to remember memories from when you were younger? • Do you find it easy to remember events from the day or the week before? • Observations to look for: ○ Asking the same questions repeatedly. ○ Difficulty following directions. ○ Increased confusion about time, people and places. Support resources: • Dementia - early signs, symptoms, treatment and statistics | healthdirect • Memory disorders | healthdirect

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Question: Are there any risks, hazards or safety concerns in your home including any environmental concerns?	
Response options	• No • Yes • Unsure
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from screening instrument if completed (field on if there are risks and hazard concerns in client's home)

Question: Are there any risks, hazards or safety concerns in your home including any environmental concerns?	
Response guidance	Context: • The triage person should identify whether there are any risks, hazards or concerns to the client in their home. • This may include any environmental concerns, such as access issues (broken steps, uneven footpath, or overgrown lawns/garden), presence of pets, or signs of clutter or hoarding. • This question may also include whether the client has any issues with personal safety including family violence (including physical danger or other treats) and abuse (including physical, emotional financial). Consider: • Any risks, hazards or concerns in the home environment. This may include access issues (broken steps, uneven footpath or overgrown lawns/garden), presence of pets, or signs of clutter or hoarding. • Whether the client has a personal alarm, and whether it has been checked in the last year • Whether the client has a personal emergency plan in place, or would benefit from developing one. • Any risks to the personal safety of the client. If the client is at risk of suspected abuse or if there has been confirmed abuse. Recommendation • Follow your assessment organisation's protocol for reporting elder abuse. • If the client is in immediate danger, call 000. Prompts: • Do you have any modifications/equipment in place? • Is this need met? • What do you feel you need to address your needs? • What are the problems? • Are there any concerns about your own personal safety? Are you afraid/concerned about any other people in the household?

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Question: Are there any risks, hazards or safety concerns in your home including any environmental concerns?	
	• Do you feel safe at home? Is the person safe at home? <u>Support resources</u> • 1800-RESPECT (24-hour national sexual assault, family & domestic violence helpline) • Helpline 1300 651 192 • Elder abuse | Australian Human Rights Commission

Question: General wellbeing and safety notes	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No

Response guidance	<u>Context:</u>
	
	• Any notes from the previous questions on the client's general wellbeing and safety.
	• This should include a summary of the general wellbeing of the person, considering their experience of social isolation/loneliness, low mood/changes in mood, difficulties with memory and confusion and personal safety and home safety concerns.
	• This could also include any related matters raised in response to questions.
	
	<u>Consider and record:</u>
	
	• A succinct summary of:
	  ○ Any loneliness/isolation/low mood/changes in mood;
	  ○ Any memory problems/confusion, diagnosis, severity, timeframe experienced and any risks;
	  ○ Any home safety/personal safety concerns;
	  ○ Any relevant discussion/recommendations/follow up with referrer; and
	  ○ Any relevant notes of urgency of assessment.
	• If there was any conflicting information shared in response to the previous general wellbeing and safety questions (e.g.

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Question: General wellbeing and safety notes	
	if the client and a support person had different views to each other). • Any additional information on the client's general wellbeing and/or safety that may need to be explored further during the assessment. ○ This includes if the client has voluntarily shared any cognitive concerns, home/personal safety issues or referenced something that could be considered a behavioural concern. Prompts: • Was loneliness/isolation/low mood identified as an issue? • Does the person want services/assistance with this? • What does the person want? • Were changes in memory/confusion noted? • Are there safety concerns? • Are there any home safety issues identified that requires equipment/modifications? • Are there any personal safety issues identified? • Is the person safe? • How urgent is the intervention required?

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Advice for assessment

Question: What type of assessor is recommended for client assessment?	
Response options	• Clinical • Non-clinical • Not eligible for assessment
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • The triage person should validate if the client requires a home support assessment (non-clinical), a comprehensive assessment (clinical) or is ineligible for an assessment (not eligible). • On completion of triage, a team leader is able to convert to a comprehensive assessment if the client's needs exceed the level of care that can be provided through

Question: What type of assessor is recommended for client assessment?	
	entry-level support (please note it is not possible to revert back to a home support assessment). Consider and record: • This question does not require any prompting with the client, and is the judgement of the person undertaking triage based on responses to previous triage questions. • Select a response based on the assessment type required by the client, rather than the experience of the assessor that the assessment will be allocated to. ○ For example, non-clinical is the correct response for a client requiring a home support assessment even if the assessor undertaking this assessment has clinical experience. • If the client requires a different assessment type than what was recommended in the screening instrument, complete the triage and then action accordingly by transferring or rejecting the assessment referral.

Question: Require an urgent assessment?	
Response options	• High urgency - Client is in hospital • High urgency - Client is at immediate risk of self-harm or in a crisis situation (e.g. client carer incapacitated) • High urgency - Client from a vulnerable cohort and/or has complexity • Medium urgency - Client at home but needing services • Urgent assessment not required
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • The triage person should identify if the client has a need for an urgent assessment. • Responses to this question may be used by assessment organisations to assist with their planning for the timing of assessments. Consider and record:

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Question: Require an urgent assessment?	
	• If the client has a need for an urgent assessment. • Consider the client's situation, location, current formal and informal supports, safety concerns, other options available (e.g. Carers Gateway, private services, family). • This question does not require any prompting with the client, and is the judgement of the person undertaking triage based on responses to previous triage questions. • Consider the definitions embedded in the response options. <u>Recommendations:</u> • Linking support and/or urgent service referrals may need to be considered for clients in at-risk environments.

Question: Linking supports suggested for assessment	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	<u>Context:</u> • The triage person should identify any linking supports suggested to consider for the assessment. • Linking support is designed to assist clients who have issues or circumstances that may impede their access to aged care services. • Linking support activities are aimed at working with the client to address areas of vulnerability that are preventing access to receiving mainstream aged care support or care, to the extent that the client is willing or able to access aged care services. • The assessment should assist to identify the complexity of a client, and their risk of vulnerability, indicating a potential need for linking support. <u>Consider and record:</u>

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Question: Linking supports suggested for assessment	
	• Does the risk or issue associated with the below areas warrant urgent intervention and/or support to minimise deterioration? ○ If the client is living in inadequate housing, insecure tenure or is already homeless. ○ If there is risk of, or suspected or confirmed abuse. The type of abuse can include physical abuse, sexual abuse, psychological abuse and financial abuse (including lack of control of finances). ○ If the client has emotional or mental health issues that significantly limits capacity, requires intensive supervision and/or frequent changes to support. ○ If there are any impacts of financial disadvantage, which may include not having the available resources to purchase healthy food, afford appropriate housing, pay for utilities and services or cover medical and dental costs. ○ If the client has experienced adverse effects of institutionalisation and/or systems abuse (e.g. spending time in institutions, prisons, foster care, residential care or out of home care) and is refusing assistance or services when they are clearly needed to maintain safety and wellbeing. ○ If the client is exposed to risks due to drug and/or alcohol related issues and likely to cause harm to themselves or others. ○ If the client is exposed to risks or is self-neglecting of personal care and/or safety, and likely to cause harm to themselves and others. ○ If the client is experiencing declining cognitive health, memory issues or confusion that significantly limits self-care capacity, requires intensive supervision and/or frequent changes in support. ○ If the client belongs to a population cohort who is at risk of vulnerability. ○ If the client presents with indicators that imped access to the delivery of aged care services. This can include clients who refuse assistance required to maintain safety and wellbeing at home. <u>Prompts:</u> • Do you feel safe?

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Question: Linking supports suggested for assessment	

	• Is there anyone you trust who can help you or be with you during your assessment?
	• If no:
	  ○ Do you want to go ahead with the assessment?
	  ○ Can I organise support for you?
	  ○ Is there anything else I should know about you/your circumstances/preferences for the assessment?
	
	<u>Recommendations:</u>
	
	• Recommendation/referral to a GP, mental health services, psychiatrist.
	• Recommendation/referral to Care Finder/advocacy service.
	• Recommendation/referral to local drug and alcohol services.
	
	<u>Support resources</u>
	
	• Older Persons Advocacy network: www.opan.org.au or 1800 700 60

Question: Priority of assessment	
Response options	• High • Medium • Low
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	<u>Context:</u> • The triage person should indicate the client's priority of assessment based on responses provided to triage questions. • Refer to the My Aged Care Assessment Manual for further information on assessment priority considerations.

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Question: Does the client require urgent service provision (direct to service)?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete.
Pre-populated information	No - From Screening to Triage or Triage to Assessment
Response guidance	Context • The Triage person may determine the need for urgent referral for services at triage, if not recommended at the screening stage. • This a mandatory question and requires a *Yes* or *No* answer. This question is used to determine the need for urgent services via the Alternative Entry pathway and details must be added to a free text box.. The Alternative Entry pathway allows individuals to start accessing aged care services immediately. Certain conditions must be met to access aged care services through the Alternative Entry pathway. Consider and record: One of the following three circumstances outlined in the *Aged Care Rules 2025 are* required to be applicable when answering the urgent service provision question (yes/no) in Triage: ○ A person urgently needs access to services and there is significant risk of harm to that person if they don't access those services, ○ A person who is an Aboriginal and/or Torres Strait Islander can't access a culturally safe needs assessment at the time they are seeking to access services, or ○ For a person accessing aged care services under a specialist aged care program (NATSIFACP, CHSP, TCP or MPSP), there is a delay in an aged care assessor becoming available at the time they are seeking access to those services.

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Question: Outcome/advice for assessment notes	
Response options	Textbox for written response

Question: Outcome/advice for assessment notes	
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • Any other relevant notes on what was identified through triage. • This could include any suggested topics for the assessor to explore further/focus on in the assessment. Consider and record: • This question does not require any prompting with the client and is the judgement of the person undertaking triage based on responses to previous triage questions.

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Assessment details section

The purpose of the assessment details section of the IAT is to collect information on the date and mode of assessment, and who was consulted before, during and after the assessment.

Assessment date

Question: Date of assessment	
Response options	Select date of assessment from calendar
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • First clinical intervention is first date that contact of a clinical nature (i.e., non-administrative) that is made between an assessment organisation and the person (or their representative), their carer, a service provider or a clinician in response to the person's referral for a comprehensive assessment. Consider and record: • The current date will be displayed to support instances where assessment information is being recorded at the assessment, or immediately following. • The date will need to be edited if assessment information is being recorded on any day following the face-to-face assessment.

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Participants consulted prior to the assessment

Question: Participants consulted prior to the assessment	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Question: Participants consulted prior to the assessment	
Response guidance	Context: • This refers to the person(s) that have been consulted prior to the assessment. • This may include person(s) that have a role in providing the client with support, such as the client's representative, family, carer(s), existing service provider or GP. • This contact does not refer to the date a client was contacted to make an appointment, but refers to contact of a clinical nature to obtain information relevant to the assessment. Consider and record: • Record the person(s) name in details. • If the person(s) is already identified as a representative or if the person's name is listed in the relationship section on the client record, record that contact information is available on the client record. • If the person(s) is not a representative or relationship is not identified on the client record, consider whether they should be established as a representative or relationship, and/or add the person's information in detail (including their relationship to the client and their contact details). It is important that consent is gained to undertake this activity.

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Mode of assessment

Question: Mode of assessment	
Response options	• Face-to-face • Over the phone • Via telehealth
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • This response will pre-populate in the client's support plan (assessment summary)
Response guidance	Context:

Question: Mode of assessment	
	• The main approach taken to collecting mode of assessment information (i.e., telehealth (video call), over the phone or face-to-face). • This question relates to an assessment, rather than triage or other activities. • Face-to-face is the preferred approach for assessments and must take place where possible. <u>Consider and record:</u> • The assessor must make additional efforts to ensure the quality of assessment is not compromised when conducting a telehealth assessment and that assessment decisions remain evidence based. • Where face-to-face contact between the assessor and a client is not possible (for example, when assessing a client in a remote area), a phone call or telehealth (video call) assessment may be undertaken. • Another suitably qualified person (such as a local health worker) may attend the assessment with the client to assist the assessment process. Further information is available in the My Aged Care Assessment Manual.

Assessment setting

Question: Assessment setting	
Response options	• Client's home • Carer's home • Other community setting • Residential aged care service • Private hospital • Public hospital • Other hospital in-patient setting – private • Other hospital in-patient setting – public • Clinic or other health setting not otherwise specified • Other
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • This response will pre-populate in the client's support plan (assessment summary)

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Question: Assessment setting	

Response guidance	Context:
	
	• This refers to the location of first contact with the client for the purposes of an assessment. Information about the setting of the first contact describes the environmental context in which the assessment has occurred.
	• This question relates to an assessment, rather than triage or other activities.
	
	Consider and record:
	
	• If possible, the initial assessment should be face-to-face in the **client's usual accommodation** setting. This will assist with the environmental, physical, and social components of the assessment by observing the client's level of independence, functioning, and existing support arrangements in familiar surroundings.
	• The location at which the assessment occurred with the client.
	• Use the below definitions to assist with the response.
	  ○ **In the client's home:** The location the client has nominated as their usual place of residence. This should match the information provided in 'address details'.
	  ○ **In the carer's home:** Where the carer of the client lives. This is the residence recorded on the representative record. An assessor should add carer contact and address details to the Representative record if not already available.
	  ○ **Other community setting:** All other community settings, such as private homes, outpatient clinics, retirement villages, independent living units, supported residential services/facilities, Aboriginal Medical Centres and supported accommodation settings in the community.
	  ○ **Residential aged care service:** For clients in a residential aged care service, multipurpose service or multipurpose centres and Indigenous flexible pilots, regardless of the level of care received by the person or whether the client is a permanent or respite resident.
	  ○ **Hospital (Public or Private):** For clients in hospital.
	  ○ **Other hospital inpatient setting (Private or Public clinic):** Hospital settings other than acute care, in which the person is an admitted patient receiving

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Question: Assessment setting	
	overnight care, admitted patients in extended care or rehabilitation facilities or other non-acute wards/beds in hospital. ○ **Clinical or other health setting not otherwise specified:** any clinical or health setting not flagged in above response options ○ **Other:** if none of the above options apply. You will need to provide more detail in selecting this question.

Who assessment information was collected from

Question: Assessment information collected from	
Response options	• Client • Client's carer • Client's representative • Client's GP • Service provider • Healthcare professional • Aboriginal liaison officer • Aged care connector and coordinator • Care finders • Via interpreter • Agent • Other – provide details
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • This response will pre-populate in the client's support plan (assessment summary)
Response guidance	<u>Context:</u> • This refers to the person/s or organisation/s that information is collected from at the time of assessment. • In most instances, this will be the client. • In very exceptional circumstances, a client may not be present or involved in the assessment. If this is the case, ensure you have consent from the client for information to be provided on their behalf. <u>Consider and record:</u>

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Question: Assessment information collected from	
	• Consider whether the person(s) should be established as a representative or relationship for the client, if they are not already. • Where possible, in assessing a client, the assessor should involve the person's carer, if possible, as they also play an integral part in developing the most suitable support plan. • Please use the 'other' response option and provide details if no other response option is appropriate. <u>Prompts and/or observations:</u> • Who will be joining you for your assessment today? • Are you happy for them to participate in your assessment?

Professions who participated in the client assessment

Question: Professions of those who participated in the client assessment	

Response options	• Medical practitioners
	  ○ Generalist medical practitioner
	  ○ Geriatrician
	  ○ Psychogeriatrician
	  ○ Psychiatrist
	  ○ Rehabilitation specialist
	  ○ Other medical practitioners
	• Nursing Professionals
	  ○ Nurse manager
	  ○ Nurse educator and researcher
	  ○ Registered nurse
	  ○ Registered mental health nurse
	  ○ Registered development disability nurse
	  ○ Other nursing professional
	• Health Professionals
	  ○ Occupational therapist
	  ○ Physiotherapist
	  ○ Speech pathologist/therapist
	  ○ Podiatrist
	  ○ Pharmacist
	  ○ Aboriginal health worker
	  ○ Other health professional
	• Social Welfare Professionals
	  ○ Social worker
	  ○ Welfare and community worker
	  ○ Counsellor

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Question: Professions of those who participated in the client assessment	
	○ Psychologist ○ Other social professional • Interpreter • Other professional
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • This refers to other person/s who are providing information and contributing to the assessment. • Identifying the range of disciplines or areas of expertise contributing to the client's assessment provides a picture of the extent to which an assessment requires a multidisciplinary approach. Consider and record: • The profession of each clinician or professional person, assessment organisation member or non-team member that contributes to the assessment. • If more than one contributor belongs to the same professional category, the category should only be recorded once – select their main profession or the professional category most relevant to the assessment.

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Assessor notes

Question: Assessor notes	
Response option	Text box for written response
Question rules	**Base question**
Pre-populated information	Yes: • The response will pre-populate from triage (assessor notes question for triage screen details)
Response guidance	Context: • Any notes from the previous questions on the assessment details.

Question: Assessor notes	
	• The notes field can also be used for information on contact details of who information was collected from during the assessment. <u>Consider and record:</u> • Reason why a face-to-face assessment was not possible, if applicable. • Reason why an assessment in the client's usual place of residence was not possible, if applicable. • Preferred contact details if needed after the assessment (for example, if the client is difficult to contact by telephone). • Some information from triage will automatically display in this text box. It is appropriate to edit this information with new details about the assessment if required, as this will still display in the triage section.

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Reason for assessment section

The purpose of the reason for assessment section of the IAT is to understand why contact has been made for an assessment.

Circumstance triggering contact

Question: What is the key circumstance that has triggered client/representative making contact?	
Response options	• Referral from a health professional • Hospital discharge • Fall(s) • Medical condition(s) • Difficulties with activities of daily living • Change in caring arrangement • Change in care needs • Change in living arrangement • Change in cognitive status • Change in mental health status • Experiencing social isolation/loneliness • Other
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from triage (if the client is currently a hospital in-patient, and circumstances triggering contact questions)
Response guidance	<u>Context:</u> • The situation or trigger that has led the client to contact My Aged Care. • The response will pre-populate from triage, and the assessor may need to validate that this information is still correct. • Avoid asking the client to repeat their story again. It may be more appropriate to frame questions in a way that ask the client to expand on what they shared last time. <u>Consider and record:</u> • Determine the key situation or trigger that has prompted the contact based on any of the following: ○ Information on the inbound referral;

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Question: What is the key circumstance that has triggered client/representative making contact?	
	○ Information provided by another source such as a representative, carer or friend; and/or ○ Your judgement based on the conversation. <u>Prompts and/or observations:</u> • Use the below definitions to assist with the response. ○ **Referral from health professional:** if the client has been referred by a health professional to undertake an assessment and/or to seek aged care services. ○ **Hospital discharge:** If the client has had a recent hospitalisation. ○ **Fall(s):** If the client has had a fall. ○ **Medical condition(s):** If the client has medical conditions that are impacting on their ability to undertake day-to-day tasks. ○ **Difficulties with activities of daily living:** If the client is finding it difficult to undertake day-to-day activities. ○ **Change in care needs:** If the client needs more (or less) assistance to complete everyday tasks. ○ **Change in living arrangements:** If the client has relocated to new accommodation (by choice or forced relocation), is now homeless, has a co-resident carer that moves out of their home, or a carer/support person moves into their home. ○ **Change in cognitive status:** If the client or their carer mentions that the client has experienced a change in their memory and cognition. This can include declining memory, short-term memory, poor memory, safety concerns with being left alone or using cooking appliances, forgetting to take medication, or taking the wrong medication, getting lost in familiar environments and concerns about safety when driving. ○ **Change in mental health status**: if the client has had a negative impact on their mental health and may need more assistance with managing their mental health. ○ **Other:** For any responses that are not defined in this guidance. Include relevant information if this response is chosen.

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Question: What is the key circumstance that has triggered client/representative making contact?	
	• If there is more than one key trigger or situation, select and include details in the free text response option.

How long has client experienced this circumstance

Question: How long has the client experienced this circumstance?	
Response options	• Recent acute illness/event • Gradual increase in needs over time • Long term disability • Other
Question rules	**Base question**
Pre-populated information	No

Response guidance	<u>Context:</u>
	
	• How long the client has been experiencing the circumstance/s which have prompted contact with My Aged Care and the referral for assessment.
	• The response will pre-populate from triage, and the assessor may need to validate that this information is still correct.
	• Avoid asking the client to repeat their story again. It may be more appropriate to frame questions in a way that ask the client to expand on what they shared last time.
	
	<u>Consider and record:</u>
	
	• Use the below definitions to assist with the response.
	  ○ **Recent acute illness/event:** a condition that is from a recent illness or event that has had a sudden onset for the client.
	  ○ **Gradual increase in needs over time:** the circumstance is the result of increased needs for the client relating to their physical health, emotional wellbeing, home environment and/or support that have gradually increased over time.
	  ○ **Long term disability:** the circumstance is from a permanent or significant disability that affects the client's ability to take part in everyday activities.
	  ○ **Other:** For any responses that are not defined in this guidance. Include relevant information if this response is chosen.

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Question: How long has the client experienced this circumstance?	
	• If there are multiple circumstances, select and include details in the free text response option. Prompts and/or observations: • How long have you experienced this challenge? • When did you first start experiencing these difficulties? Recommendations: • A reablement focus may be appropriate for client's experiencing a condition from a recent acute illness/event.

Main reason for seeking assistance

Question: What is the main reason for seeking assistance?	
Response options	• Improve current level of function and/or independence after a recent acute illness/event • Improve current level of function and/or independence (other) • Maintain current level of function and/or independence • Reduce rate of decline in level of function and/or independence • Other
Question rules	**Base question**
Pre-populated information	Yes: • This response will pre-populate in the client's support plan (assessment summary)
Response guidance	Context: • This aims to categorise the main reason/s that the client is seeking assistance. • This relates to the outcomes that the client is seeking from aged care services, rather than the assessment itself. Consider and record: • What the client is seeking to achieve from aged care services – their ideal outcome. • Circumstances leading up the client contacting My Aged Care and requesting an assessment.

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Question: What is the main reason for seeking assistance?	

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Carer profile section

The purpose of the carer profile section of the IAT is to understand the client's support network and caring responsibilities.

Other people living in the same household

Question: How many people excluding the client live in the same household as the client?	
Response options	Text box for number response
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	<u>Context:</u> • This aims to identify how many people live in the same house as the client, if applicable. • If the client is not living in a house (i.e., a residential care facility or a similar setting), this question will not be applicable. <u>Consider and record:</u> • What the client considers as their primary place of residency, and how many other people also have the same address as their primary place of residency. • Do not include any people that live elsewhere but stay in the same house for a specific purpose from time-to-time (i.e., caring responsibilities). • Ensure the response is excluding the client – for example, 0 if the client lives alone. • Record any contextual information about other people living in the same household as the client in the assessor notes about caring relationship. <u>Prompts and/or observations:</u> • Do you live alone? • Does anyone else live with you? • Do you have any family or friends who live with you, either short or long-term?

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Carer

Help from a carer, family member, friend or someone else

Question: Is the client receiving help from a carer, family member, friend, or someone else?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Consider and record: • If the client has more than one person providing support, identify who is the main/primary carer. Prompts and/or observations: • Do you have someone that provides you support and assistance? • Do you have someone who helps you around the house or with your day-to-day tasks? Support resources: • Services and support | Carer Gateway

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Question: If 'yes', please select an option below	
Response options	• Has a carer(s) • Has no carer • Not applicable – no carer required • Not applicable – paid carer
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context:

Question: If 'yes', please select an option below	

	• Carers can be a physical and social enabler that is integral to ensuring the quality of life and independence of the older person.
	• The *Carer Recognition Act 2010* defines a carer as an individual who provides personal care, support, and assistance to another individual who needs it because that other individual:
	  ○ Has a disability; or
	  ○ Has a medical condition (including a terminal or chronic illness); or
	  ○ Has a mental illness; or
	  ○ Is frail and aged.
	• An individual is not a carer in respect of care, support, and assistance he or she provides:
	  ○ Under a contract of service or a contract for the provision of services; or
	  ○ In the course of doing voluntary work for a charitable, welfare or community organisation; or
	  ○ As part of the requirements of a course of education or training.
	• Where possible, in assessing a client and developing a support plan, the assessor should involve the person's carer as they also play an integral part in developing the most suitable support plan.
	
	<u>Consider and record:</u>
	
	• If the client has a carer.
	
	<u>Support resources:</u>
	
	• Services and support | Carer Gateway

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Details of person(s) the client is receiving support from

The below headings are questions consolidated into one carer(s) table in the My Aged Care Assessor Portal. A breakdown by questions is provided in this user guide to help explain how to complete this table.

Carer details

Question: Details of carer(s)	
Response options	Text box for name and phone number
Question rules	**Base question**
Pre-populated information	Yes: • This response will pre-populate in the client's support plan (assessment summary)
Response guidance	Context: • An assessor should collect the carer's details and contact information. • Where possible, in assessing a client and developing a support plan, the assessor should involve the person's carer as they also play an integral part in developing the most suitable support plan. Consider and record: • The carer's full name. • The carer's phone number. Prompts and/or observations: • Can I please get their name so I can include in your assessment as someone who helps support you? • Can I please get their name and number to include as your carer in the assessment? Support resources: • Services and support | Carer Gateway

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Relationship to client details

Question: Relationship to client	
Response options	• Partner • Mother • Father • Daughter • Son • Daughter in law

Question: Relationship to client	
	• Son in law • Other relative • Friend/neighbour • Other (please specify)
Question rules	**Base question**
Pre-populated information	Yes: • This response will pre-populate in the client's support plan (assessment summary)
Response guidance	Context: • An assessor should identify and discuss the carer's relationship to the client. • Where possible, in assessing a client and developing a support plan, the assessor should involve the person's carer as they also play an integral part in developing the most suitable support plan. Consider and record: • The carer's relationship to the client. Prompts and/or observations: • What is their relationship to you? Are they family, a friend, or a neighbour? Support resources: • Services and support | Carer Gateway

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Living situation

Question: Does the person helping live with the client?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context:

Question: Does the person helping live with the client?	

	• An assessor should identify if the carer is currently living with the client.
	• Where possible, in assessing a client and developing a support plan, the assessor should involve the person's carer as they also play an integral part in developing the most suitable support plan.
	
	<u>Consider and record:</u>
	
	• Use the below definitions to assist with the response.
	  ○ **Yes**: if the carer's primary place of residency is the same as the client.
	  ○ **No**: if the carer has a different primary place of residency.
	
	<u>Prompts and/or observations:</u>
	
	• Do you both live together?
	• Do they also live somewhere else?
	
	<u>Support resources:</u>
	
	• Services and support | Carer Gateway

Employment status of person helping

Question: Does the person helping the client have paid employment?	
Response options	• Yes, full time • Yes, part time • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	<u>Context:</u> • An assessor should identify if the carer has current paid employment. • Where possible, in assessing a client and developing a support plan, the assessor should involve the person's carer as they also play an integral part in developing the most suitable support plan.

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Question: Does the person helping the client have paid employment?	
	Consider and record: • Yes options should be selected for paid employment only. • Full-time employment is at least 38 hours a week. • The part time option should be selected for casual (part-time) employment. Prompts and/or observations: • Do they also have a paid job? • How often do they work in their paid job? Support resources: • Services and support | Carer Gateway

Types of support provided by person helping

Question: Types of support provided by person helping the client	
Response options	• Light cleaning/housework • Heavy cleaning/housework • Shopping • Cooking/meals • Showering/bathing • Transport • Laundry (including washing and hanging) • Dressing • Social support/company • Mobility • Medication management • Supervision • Care coordination • Accompanying to medical appointments • Community access • Therapy assistance • Help with administration/paperwork • Decision making support • Behaviour support • Emotional support • Communication support • Overnight assistance • Chronic disease management • Continence support

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Question: Types of support provided by person helping the client	
	• Wound care • Other
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • This response will pre-populate in the client's support plan (assessment summary)
Response guidance	Context: • An assessor should indicate the type of care that the carer typically provides to the client. • Where possible, in assessing a client and developing a support plan, the assessor should involve the person's carer as they also play an integral part in developing the most suitable support plan. Consider and record: • The type of care that the carer provides. For example, a carer may assist a client with showering, shopping, or drive them to medical appointments as required. Prompts and/or observations: • What sorts of activities do they typically support you with? • What types of support do they provide you? Support resources: • Services and support | Carer Gateway

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Factors affecting carer availability and sustainability of care relationship

Question: Are there factors affecting carer availability and sustainability of care relationship?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context:

Question: Are there factors affecting carer availability and sustainability of care relationship?	

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Details of factors affecting carer availability and sustainability of care relationship

Question: Factors affecting carer availability and sustainability of care relationship	
Response options	• Carer's emotional health and wellbeing • Carer's physical health and wellbeing • Carer has other responsibilities • Carer's work/study hours • Other impacts of care
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • This response will pre-populate in the client's support plan (assessment summary)
Response guidance	<u>Context:</u> • An assessor should seek to understand further details on any factors impacting the carer's availability and the sustainability of the current relationship. • Where possible, in assessing a client and developing a support plan, the assessor should involve the person's carer as they also play an integral part in developing the most suitable support plan. <u>Consider and record:</u> • Whether there have been any recent significant changes in carer arrangements and if this impacts on the carers' ability to provide ongoing care for the client. • For example, a carer becoming unwell; passing away; moving out of the client's home or moving away from the client's area; a conflict between the client and their carer or family members; the carer choosing not to provide care anymore; or being unable to provide assistance for financial reasons. <u>Prompts and/or observations:</u> • What were the recent changes to your carer availability to support you? • What would be the future changes that will impact your carer availability to support you? • What are the changes you noticed in your carer commitments or ability to support your needs? <u>Recommendations:</u>

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Question: Factors affecting carer availability and sustainability of care relationship	
	• An assessment for the carer. • Recommendation/referral to carer support services. Support resources: • Services and support | Carer Gateway

Typical hours per day that carer provides help

Question: Typical hours per day carer provides help	
Response options	Textbox for written response
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • How much care is typically provided by a carer per day. Consider and record: • This could be an estimate or range based on a typical day, or a breakdown of each day for a typical week. • Alternatively, this could cover what a 'good week/day' looks like, and what a 'challenging week/day' looks like. Prompts and/or observations: • Do they typically provide help on most days? • How long each day do they typically provide help? • Typically, how many hours do they support you with your day-to-day needs? Support resources: • Services and support | Carer Gateway

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Add carer details

Button to select if needing to add details of any additional carer(s). Up to 10 carer details can be added.

Respite and emergency care

Formal and/or informal respite arrangements in place

Question: Are there formal and/or informal respite arrangements in place?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • An assessor should identify whether the client is currently receiving respite (informal respite, or community or residential respite). • Where possible, in assessing a client and developing a support plan, the assessor should involve the person's carer as they also play an integral part in developing the most suitable support plan. Consider and record: • If the client is receiving any formal and/or informal respite support. • This does not need to be a Commonwealth-subsidised respite care arrangement and includes other respite support arrangements. Prompts and/or observations: • Are there arrangements in place to help manage your carer's responsibilities? Do you sometimes receive some care and support from others? • Are you currently receiving any formal, informal or community respite? Recommendations: • An assessment for the carer. • Recommendation/referral to carer support services.

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Formal and/or informal respite arrangements short-term or long-term in place

Question: Are there any respite arrangements short (12 weeks or less) or long term in place?	
Response options	• Short-term • Long-term
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Response guidance	Context:
	
	• An assessor should identify if any respite arrangements in place are short-term (12 weeks or less) or long-term (more than 12 weeks).
	• Where possible, in assessing a client and developing a support plan, the assessor should involve the person's carer as they also play an integral part in developing the most suitable support plan.
	
	Consider and record:
	
	• Consider the following about any respite arrangements:
	  ○ The period of time the client receives respite.
	  ○ Whether respite is planned or unscheduled; and/or
	  ○ Where the client receives respite.
	
	Prompts and/or observations:
	
	• Are your respite arrangements in place for 12 weeks or less?
	• Will your respite arrangements end at some date in the future or are they ongoing?
	
	Recommendations:
	
	• An assessment for the carer.
	• Recommendation/referral to carer support services.
	
	Support resources:
	
	• Respite care | My Aged Care

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Emergency care plan

Question: Is there emergency care plan in place?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • This refers to whether the client has an emergency care plan in place if something should happen to their carer/s. • Where possible, in assessing a client and developing a support plan, the assessor should involve the person's carer as they also play an integral part in developing the most suitable support plan. Consider and record: • If the client has an emergency care plan in place. Prompts and/or observations: • Is there a plan in place on what to do if they were unable to provide support? • Do you and your carer have a plan in case they are unable to provide support? Recommendations: • Recommendation to develop an emergency support plan if the client does not have one. Support resources: • Emergency Care Plan | Carer Gateway

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Details of emergency care plan

Question: Details	
Response options	Textbox for written response
Question rules	**Base question**

Question: Details	
Pre-populated information	No
Response guidance	Context: • An assessor should include details of the emergency care plan in place if something should happen to their carer/s. • Where possible, in assessing a client and developing a support plan, the assessor should involve the person's carer as they also play an integral part in developing the most suitable support plan. Consider and record: • Specify details about the emergency care plan. This may include other family members, people to contact, short-term care and long-term care options or other support options including respite. Prompts and/or observations: • What is the plan you have in case your carer is unable to provide support to you?

Assessor notes about caring relationship

Question: Assessors notes about caring relationship	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	Yes: • This response will pre-populate in the client's support plan (assessment summary)
Response guidance	Context: • Any additional notes on the carer's caring relationship with the client. Consider and record: • Any difficulties or concerns the carer, or client (as a carer), has with the caring arrangement. Consider carer stress and

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Question: Assessors notes about caring relationship	

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Client as a carer

Client providing support to someone else

Question: Client is providing support to someone else	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Response guidance	Context:
	
	• Whether the client is supporting or looking after another person. It should be selected if the client is required to assist another person with activities of daily living and/or self-care tasks.
	• Carers can be a physical and social enabler that is integral to ensuring the quality of life and independence of the older person.
	• The *Carer Recognition Act 2010* defines a carer as an individual who provides personal care, support and assistance to another individual who needs it because that other individual:
	  ○ Has a disability; or
	  ○ Has a medical condition (including a terminal or chronic illness); or
	  ○ Has a mental illness; or
	  ○ Is frail and aged.
	• An individual is not a carer in respect of care, support and assistance he or she provides:
	  ○ Under a contract of service or a contract for the provision of services; or
	  ○ In the course of doing voluntary work for a charitable, welfare or community organisation; or
	  ○ As part of the requirements of a course of education or training.
	
	Consider and record:
	
	• An assessor should identify if the client provides support to some else.
	• For example, the client may assist their partner/spouse with showering daily or may supervise their taking of medications.

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Question: Client is providing support to someone else	
	• A client may be the primary carer for a child with disabilities where they are required to assist with all activities of daily living. • The client may be providing care for more than one person, for example a partner/spouse and a child with disabilities. Prompts and/or observations: • Do you have caring responsibilities for someone else? • Are you also supporting someone else? • What are your caring responsibilities for others in your life? • How do you manage your other caring responsibilities for others in your life?

Details of person(s) the client is providing care for

The below headings are questions consolidated into one carer(s) table in the My Aged Care Assessor Portal. A breakdown by questions is provided in this user guide to help explain how to complete this table.

Name of person being cared for

Question: Name	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • An assessor should collect the person's details. Consider and record: • The person's full name. Prompts and/or observations: • What is their full name?

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Question: Name	
	• Do you know their full name? • Can I please get their name so I can include in your assessment as someone you provide care for? <u>Recommendations:</u> • Establish the person as a relationship on the client record.

Relationship to person being cared for

Question: Relationship to the person the client is caring for	
Response options	• Partner • Mother • Father • Daughter • Son • Daughter in law • Son in law • Other relative • Friend/neighbour • Other (please specify)
Question rules	**Base question**
Pre-populated information	No
Response guidance	<u>Context:</u> • An assessor should identify and discuss the person's relationship to the client. <u>Consider and record:</u> • The person's relationship to the client. <u>Prompts and/or observations:</u> • What is their relationship to you? • Is the person you are caring for a friend, family, or neighbour?

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Category person being cared for matches

Question: Which category does the person the client is caring for match?	
Response options	• ≥ 65 years old and not Aboriginal or Torres Strait Islander • ≥ 50 years old and is an Aboriginal or Torres Strait Islander • ≥ 45 years old and is an Aboriginal or Torres Strait Islander and homelessness or at risk of homelessness as a result of experiencing housing stress or not having secure accommodation • ≥ 50 and over and not Aboriginal and Torres Strait Islander and who are homeless or at risk of homelessness as a result of experiencing housing stress or not having secure accommodation • Does not meet any of above criteria • Other (please describe)
Question rules	**Base question**
Pre-populated information	No
Response guidance	<u>Context:</u> • An assessor should determine the category/criteria of the person that the client is providing care for. • The criteria relates to different considerations relating to general eligibility for aged care. <u>Consider and record:</u> • Identify the most appropriate category/criteria of the person that the client is providing care for. • Select other if none of the categories are appropriate and there is further details that should be included. If there is no further detail to provide, select that the person does not meet any of the above criteria. <u>Prompts and/or observations:</u> • Can you please tell me more about the person you are caring for? • Does the person you are caring for identify as Aboriginal or Torres Strait Islander? • How old is the person you are caring for? • Is the person you are caring for at risk of homelessness because of experiencing housing stress or not having secure accommodation?

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Question: Which category does the person the client is caring for match?	
	Recommendations: • An assessment for the person, if applicable.

Types of support provided to person being cared for

Question: Describe the types of support provided by client	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • An assessor should identify and discuss the level of support the client provides to the person identified. Consider and record: • The type of care that the client provides and how often it is provided. • If multiple people provide support to the person, not just the client. Prompts and/or observations: • What help do you provide them? • How long have you provided this level of help? • How do support their care needs? • How long have you been supporting their care needs?

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Add person's details

Button to select if needing to add details of any additional person/s that client has caring responsibilities for. Up to 10 person details the client is caring for can be added.

Assessor notes about client as a carer

Question: Assessors notes	
Response options	Textbox for written response
Question rules	**Base question**

Question: Assessors notes	
Pre-populated information	No

Response guidance	Context:
	
	• Any additional information on the client's role as a carer and how they are managing the responsibility.
	
	Consider and record:
	
	• Whether there are any difficulties or concerns with the caring arrangement such as:
	  ○ Carer – stress and strain, physical exhaustion/ illness/health deterioration, difficulties with specific tasks, factors unrelated to the care situation
	  ○ Client – increasing needs, other factors.
	• The support the client is receiving in their caring role (e.g. from family, friends, community, other organisations)
	• Whether there have been any recent significant changes in the caring arrangements and if this impacts on the clients' ability to provide ongoing care for the person.
	
	Prompts and/or observations:
	
	• Has there been any recent changes in the level of help you need to provide them?
	• How are you coping with your caring responsibilities?
	• Do you have others that can help you with your caring responsibilities if needed?
	
	Recommendations:
	
	• An assessment for the person that the client is a carer for.
	• Recommendation/referral to carer support services.
	
	Support resources:
	
	• Services and support | Carer Gateway

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Medical and medications section

The purpose of the medical and medications section is to understand any health conditions being experienced by the client, any medications currently prescribed, and if the client regularly or has recently visited any healthcare services.

Medical treatments

Question: Client in receipt of medical treatments	
Response options	• Drip infusion in vein • Home Dialysis (peritoneal or haemodialysis) • Centre/hospital Dialysis • Stoma care • Oxygen Therapy • Use of ventilator • Tracheostomy care • Nursing care for pain • Enteral Feeding Supplement – Bolus • Enteral Feeding Supplement – Non-bolus • Parenteral feeding (intra-venous hyperalimentation) • Care for chronic ulcer • Urethral catheter
Question rules	**Base question**
Pre-populated information	No

Response guidance	<u>Context:</u>
	• The assessor should identify if the client is currently receiving any medication treatments.
	
	<u>Consider and record:</u>
	• Use the below definitions to assist with the response.
	  ○ **Drip infusion in vein:** an intravenous (IV) infusion, commonly known as a drip, involves delivering fluids or medications directly into your veins. Instead of swallowing them, a cannula (a narrow, flexible tube) is inserted into a vein usually in the back of the hand or lower arm.
	  ○ **Home Dialysis (peritoneal or haemodialysis):** home dialysis is the ability to manage kidney disease and receive treatment at the patient's home.

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Question: Client in receipt of medical treatments	
	○ **Centre/Hospital Dialysis:** centre/hospital dialysis is the management of kidney disease and receiving treatment in a dedicated centre or at a hospital. ○ **Stoma care:** a stoma is a small opening in the abdomen that allows the removal of bodily waste such as faeces or urine into a collection bag. ○ **Oxygen Therapy:** oxygen therapy, also known as supplemental oxygen, is a medical treatment that provides additional oxygen to individuals who cannot obtain sufficient oxygen naturally. ○ **Use of ventilator:** a ventilator is a protective device worn over the mouth and nose. Their primary purpose is to filter the air and prevent inhalation of harmful materials. ○ **Tracheostomy care**: involves managing and maintaining a tracheostomy, which is a small surgical opening made through the front of the neck into the windpipe (trachea). ○ **Nursing care for pain:** nursing care for pain involves a comprehensive approach to assess, manage, and alleviate discomfort experienced by patients. ○ **Enteral Feeding Supplement – Bolus:** a specialised nutritional product designed to support individuals who require enteral feeding. Bolus feeding is a method of enteral feeding where a series of smaller volume feeds are given at regular intervals. ○ **Enteral Feeding Supplement – Non-bolus:** a specialised nutritional product designed to support individuals who require enteral feeding. Non-bolus feeding involves a continuous infusion of enteral feed over an extended period, often using a pump to provide a steady flow of nutrients throughout the day and/or night. ○ **Parenteral feeding (intra-venous hyperalimentation):** Parenteral nutrition, also known as total parenteral nutrition (TPN) or hyperalimentation, is a life-sustaining therapy that provides essential nutrients intravenously to individuals who cannot obtain adequate nutrition through oral or enteral (tube feeding) routes. ○ **Care for chronic ulcer:** commonly known as bedsores, are injuries to the skin and underlying tissue caused by prolonged pressure or friction.

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Question: Client in receipt of medical treatments	
	Caring for bedsores includes regular assessment, relieving pressure, keeping the wound clean, dressing the wound, and monitoring for signs of infection. ○ **Urethral catheter**: a hollow, flexible tube used to drain urine from the bladder when a person cannot empty their bladder naturally. Prompts and/or observations: • Are you receiving any medical treatments for any of your health conditions? • Are you receiving any regular medical treatments at the moment?

Health conditions

The below sub-headings are consolidated into one health conditions table in the My Aged Care Assessor Portal.

Health condition

Question: Health conditions	
Response options	Select from dropdown (extensive list of options – see Appendix A)
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • This response will pre-populate in the client's support plan (assessment summary)
Response guidance	Context: • The assessor should identify whether the client has any health conditions, including mental health conditions or disabilities that have an impact on the person's need for assistance with activities of daily living and social participation. • Health conditions included in this response can be new or pre-existing health conditions. Consider and record:

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Question: Health conditions	
	• A client may not provide the actual name of the condition. For example, a client may state that they have a 'bad back', 'bad hips', 'heart trouble' or 'my memory isn't as good as it used to be and I'm having difficulty remembering things'. • Ask the client if their difficulties are due to a pre-existing condition such as arthritis, hypertension (high blood pressure), recent diagnosis of dementia or another physical, neurological or mental health condition/disability. • Document the information that is provided by the client. • Assessors should consider the below progressive conditions for a clients' eligibility for Assistive Technology and Home modifications with the corresponding health condition code in parenthesis: ○ Cerebral Palsy (code:0610) ○ Epilepsy (includes seizures) (code:0608) ○ Huntington's disease (code:0602) ○ Motor neurone disease (code:0603) ○ Multiple sclerosis (code:0607 OR code:1304) ○ Parkinsons disease (code:0604) ○ Poliomyelitis (polio) (code:0102) ○ Spinal cord injury (code:1699) ○ Stroke (code:0915) ○ Muscular dystrophy (code:0609) ○ Spinal Muscular Atrophy (code:0699) ○ Acquired Brain Injury (code:1601) ○ Muscular Atrophy (code:1399) <u>Prompts and/or observations:</u> • Review the information included by the referrer (such as a GP or other health professional). • Ask the client if their difficulties are due toa pre-existing condition such as arthritis, hypertension (high blood pressure), recent diagnosis of dementia or another physical, neurological or mental health condition/disability. Document the information that is provided by the client. • Assist the client/carer to recall past problems using a systematic method such as a head to toe scan (start at the head and work down).

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Diagnosis status

How the health condition was identified and/or confirmed.

Question: Diagnosis status	
Response options	• Client reported • GP confirmed • Hospital confirmed • Other health practitioner confirmed
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • The assessor should identify whether the health condition has been diagnosed, and by whom. Consider and record: • Determine the diagnosis status of the health condition. • Review the information included by the referrer (such as a GP or other health professional). Prompts and/or observations: • Can you share how your first came to experience your health condition? • Did you go to a GP, hospital or visit another health practitioner to discuss the health condition?

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Primary health condition

Button to select if health condition has greatest impact on the client's need for assistance.

Add health condition

Button to select if needing to add health condition/s for the client.

Impact on health issues on normal activities during past 4 weeks

Question: Impact of health issues on normal activities (outside or inside the home) during the past 4 weeks	
Response options	• Not at all • Slightly • Moderately • Quite a bit

Question: Impact of health issues on normal activities (outside or inside the home) during the past 4 weeks	
Question rules	**Threshold questions** are mandatory to complete. If 'moderately' or 'quite a bit' is selected, additional questions on an advanced medical assessment will be prompted. This question will be presented to all assessors.
Pre-populated information	Yes: • Response will pre-populate from triage (impact of health issues on normal activities during past four weeks question)

Response guidance	<u>Context:</u>
	
	• The assessor should seek to understand what the impacts of health issues have been on the client's normal activities during the past four weeks.
	
	<u>Consider and record:</u>
	
	• If the client has experienced any impacts on normal activities during the past 4 weeks due to any health issues they are experiencing.
	• This should consider normal activities in both inside and outside of the home.
	• Use the below definitions to assist with the response.
	  ○ **Not at all:** no impacts on normal activities.
	  ○ **Slightly**: an occasional and/or minor impacts on the ability to undertake normal activities.
	  ○ **Moderately:** an almost regular and/or moderate impacts on the ability to undertake normal activities.
	  ○ **Quite a bit:** an almost constant and/or major impacts on the ability to undertake normal activities.
	
	<u>Prompts and/or observations:</u>
	
	• How have your health issues impacted your day-to-day activities in the past 4 weeks?
	• How often do you feel your health issues interfere with your day-to-day activities in the past 4 weeks?

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Advanced medical assessment

Recent GP visits and health checks

Question: Recent GP visits and health checks	
Response options	• Yes • No
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures. The assessor will need to make a declaration in the IAT before they can view the questions in the advanced medical assessment section. A supervising clinical assessor can be selected at any point before finalising the IAT.
Pre-populated information	No
Response guidance	Context: • The assessor should identify if the client has recent contact with a GP and/or has regular health checks • Health checks can include cancer screening, mammograms, flu vaccinations etc. Consider and record: • Whether the client has recently seen a GP or had a health check Prompts and/or observations: • Have you had a recent GP visit or health check? • When was the last time you had a GP visit? • How often do you have health checks? When was the last time? Recommendations: • Recommendation/referral to GP, including for a health assessment (over 75 health check).

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Details of recent GP visits and health checks

Question: Specify	
Response options	Textbox for written response
Question rules	This question will be presented to all assessors.

Question: Specify	
	If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures. The assessor will need to make a declaration in the IAT before they can view the questions in the advanced medical assessment section. A supervising clinical assessor can be selected at any point before finalising the IAT.
Pre-populated information	No
	Context: The assessor should summarise details on recent contact with a GP and/or a health check (including cancer screening, mammograms, flu vaccinations etc.). Consider and record: When was the last time that the client visited a GP and/or had a health check. Whether the client regularly sees a GP, and how frequently. Why a client doesn't regularly see a GP or have health checks. Prompts and/or observations: Use language the client understands to identify if they have had checks such as blood pressure, medication review, continence matters, flu. Advocate the value in regular GP check-ups, particularly after a hospital admission. Recommendations: Recommendation/referral to GP, including for a health assessment (over 75 health check).

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Hospital admittance in last 12 months

Question: Recent hospital admittance	
Response options	No Yes planned Yes unplanned
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures. The assessor will need to make a declaration in the IAT before they can view the questions in the advanced medical assessment

Question: Recent hospital admittance	
	section. A supervising clinical assessor can be selected at any point before finalising the IAT.
Pre-populated information	No
Response guidance	Context: The assessor should identify if the client has been admitted to hospital in the past 12 months. Consider and record: Whether the client has been admitted to hospital in the past 12 months. If yes, determine if this was a planned or an unplanned hospital admittance. Use the below definitions to assist with the response. Planned: a planned hospital admittance occurs when a patient's medical condition requires advanced treatment and hospitalisation, and the healthcare provider/specialist is aware of the need. Planned visits are scheduled in advance. Unplanned: an unplanned hospital admittance occurs when a patient's medical condition requires urgent or unexpected hospitalisation. Patients may arrive at the hospital in their own transport or via an ambulance. Prompts and/or observations: Have you been admitted to the hospital in the last 12 months? Was your hospital admittance planned in advanced? Was your hospital admittance unexpected? Where did you go when you arrived at the hospital?

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Details of hospital admittance in last 12 months

Question: Details	
Response options	Textbox for written response
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures. The assessor will need to make a declaration in the IAT before they can view the questions in the advanced medical assessment section. A supervising clinical assessor can be selected at any point before finalising the IAT.

Question: Details	
Pre-populated information	No
Response guidance	Context: The assessor should summarise details on any planned or unplanned hospital admittance/s in the last 12 months. It is important to know whether the client has had any recent admissions to hospital which could be the reason for the referral for an assessment. Collecting vital information relating to hospital admission provides assessors with an understanding as to what occurred as a result of the hospital stay. In the event an assessment is undertaken in the hospital setting, information can be collected from the client, family, the client's medical record, nursing staff or other health professionals involved in the client's admission. Consider and record: How many times a client has been admitted over the past 12 months, including if they have had recent admissions in the past three months. The reason for these admissions. The outcome of the admissions. Any significant inpatient events. Whether the hospital admission resulted in health professional assessments such as Occupational Therapy assessment for home safety; physiotherapy assessment for aids; or continence assessment. Note the outcomes of these assessments, such as if equipment was supplied or if the client was referred to a provider outside of the hospital. Whether aids/equipment were recommended as a result of the hospital stay. For example: Self-care aids such as special cutlery and crockery, grab rails in bath/shower, bowel and urinary appliances, bath seats, shower chairs/stools, commodes or hand held showers etc. Support and mobility aids such as splints, hospital beds, cushions/pillows, crutches, walking sticks, walkers or wheelchairs etc. Communication aids such as phone attachments, writing aids, speaking aids or hearing aids. Reading aids such as magnifying / reading glasses, braille books, reading frames or talking books etc. Prompts and/or observations:

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Question: Details	
	Can you share some more details of your recent hospital admittances in the last 12 months? How many times did you go to hospital in the last 12 months? How long were your stays at hospital each time? What was your recovery from these hospital visits? Did you have follow up appointments with a health professional?

Allergies and/or sensitivities

Question: Allergies and/or sensitivities	
Response options	Yes No
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures. The assessor will need to make a declaration in the IAT before they can view the questions in the advanced medical assessment section. A supervising clinical assessor can be selected at any point before finalising the IAT.
Pre-populated information	No
Response guidance	Context: The assessor should determine whether the client has and/or has had allergies and/or sensitivities such as food, medication and environmental allergies and/or sensitivities. Consider and record: Record if the client or health professional has indicated if they have allergies and/or sensitivities such as food, medication and environmental allergies and/or sensitivities. Prompts and/or observations: Have you had a reaction to a medication? Food? Something in the environment? E.g. developed a rash, itchiness, vomiting, fainting, lumps or bumps? Support resources: Allergies | healthdirect

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Details of allergies and/or sensitivities

Question: Specify	
Response options	Textbox for written response
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures. The assessor will need to make a declaration in the IAT before they can view the questions in the advanced medical assessment section. A supervising clinical assessor can be selected at any point before finalising the IAT.
Pre-populated information	No
Response guidance	Context: The assessor should summarise details if the client has indicated allergies and or sensitivities to environment, medication or food. Consider and record: Record a client's allergies and/or sensitivities such as food, medication and environmental allergies and/or sensitivities. Record the reactions the client may have if they come in contact with the allergens and/or sensitivities and whether they have a severe reaction or one that they manage themselves. Prompts and/or observations: Can you tell me about your experience from the allergy or sensitivity? Have you had a reaction to a food? Medication? Something in the environment? E.g. developed a rash, itchiness, vomiting, fainting, lumps or bumpiness? Support resources: Allergies | healthdirect

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Source of reported allergies and/or sensitivities

Question: Source of reported allergies/sensitivities	
Response options	Client reported Health professional reported

Question: Source of reported allergies/sensitivities	
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures. The assessor will need to make a declaration in the IAT before they can view the questions in the advanced medical assessment section. A supervising clinical assessor can be selected at any point before finalising the IAT.
Pre-populated information	No
Response guidance	Context: Whether the allergies and/or sensitivities have been reported by the client or by a health professional. Consider and record: If the allergies and/or sensitivities are client reported or health professional reported. Prompts and/or observations: Were these allergies/sensitivities tested by a health professional? Were these allergies/sensitivities self-observed? Have you had the allergies/ sensitives tested by a health professional? Recommendations: Referral to a health professional for allergy testing. Support resources: Allergy testing – skin prick tests and blood tests | healthdirect

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Medications

Question: Is the client taking medications?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Question: Is the client taking medications?	
Response guidance	Context: • The assessor should identify whether the client is taking any medication to manage their health conditions. • Medications may have been recommended by their doctor, specialist or pharmacist. • For this question, medication refers to prescription and over the counter/off the shelf medication. Consider and record: • If the client is taking any medication to manage their health conditions. Prompts and/or observations: • Are you taking any medication to help with your health conditions? • Can you talk me through what medicines you need to take each day?

Number of medications

The outcome sought from this question is to understand if the volume of medication for the client is manageable.

Question: How many medications does the client currently take, including over the counter medicines?	
Response options	• 0 to 4 • 5 to 14 • 15 or more
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • The assessor should identify how many medications does the client currently take. Note: polypharmacy (use of multiple medications) is a considerable risk for older people. • Medications may have been recommended by their doctor, specialist or pharmacist.

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Question: How many medications does the client currently take, including over the counter medicines?	
	• For this question, medication refers to prescription and over the counter/off the shelf medication. <u>Consider and record:</u> • The number of prescribed and over the counter/off the shelf medication that the client is currently taking. <u>Prompts and/or observations:</u> • How many medications do you take? • Do you take medication on a regular basis? How many different types of medication do you take? <u>Recommendation</u> • Recommendation/referral to GP for a home/residential Medication Review (an Australian Government-subsidised program).

Assessor notes on medication details

Question: Assessors notes medication	
Response options	Textbox for written response
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Response guidance	<u>Context:</u>
	
	• Additional details on the medication that the client is currently taking.
	
	<u>Consider and record:</u>
	
	• **For all assessment types:**
	  ○ Any additional details shared by the client on any challenges with the current management their medications.
	• **For comprehensive assessments only**:
	  ○ Current medication(s) (by name);

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Question: Assessors notes medication	
	○ How the medication(s) are administered; ○ The source of medication information (e.g. direct observation, discharge. Summary, GP, pharmacist); ○ The client's compliance with medication administration; and ○ Details on over-the-counter or non-prescription medications used by the client (including eye drops, creams/lotions, inhaled medication, natural therapies, injections etc.). <u>Prompts and/or observations:</u> • **For all assessment types:** ○ Are there any concerns about medications, side effects or are a high number of medications being taken? ○ Do pain levels fluctuate throughout the day? How do you manage this? • **For comprehensive assessments only** ○ What medication do you take? ○ Why do you take this medication? ○ Ask the client to show you their medication and to demonstrate how they use their dosette box/blister pack if present. ○ Check if the client is clear about their medication schedule. ○ Does the client carry any medications for emergencies? ○ Do any of the medications impact on daily activities (e.g. causes lethargy, lack of focus, mobility etc.)? ○ Is medication prompting required? ○ Does the client use any form of dispenser for medication administration i.e. blister pack or dosette box? ○ Does the client carry any medications for emergencies? Recommendations: • Recommendation/referral to GP for a home/residential Medication Review (an Australian Government-subsidised program).

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Assessor notes on medical domain

Question: Assessor notes	
Response options	Textbox for written response
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • This is to provide a holistic summary of the client's health conditions and how this impacts on all activities of daily living. • It is not necessary to re-record details on individual health concerns in this response. Consider and record: • A summary of health conditions identified. • Any allergies and/or sensitivities identified.

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Function section

The purpose of the function section of the IAT is to understand the client's functional ability, the client's ability to complete activities of daily, and if the client requires further assistance with these activities.

The function section includes questions a number of functional topics. To help with the flow of these questions, assessors may wish to cover these in the following order:

1. Ability to walk;
2. Ability to climb stairs;
3. Wheelchair mobility;
4. Ability to drive;
5. Get to places out of walking distance;
6. Go shopping;
7. Undertake light housework;
8. Undertake moderate/heavy housework;
9. Ability to take a bath or shower;
10. Ability to dress;
11. Ability to groom;
12. Ability to undertake transfers;
13. Upper body strength;
14. Prepare meals;
15. Ability to eat;
16. Take medicine;
17. Handle money;
18. Use the telephone;
19. Ability to use communication devices (i.e. use a computer);
20. Ability to use online services (i.e. use the internet);
21. Ability to use a toilet; and
22. Toileting – bladder.

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General observations of client

Question: General observations of client	
Response options	Textbox for written response
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • General observations related to the client's ability to complete activities of daily living. This includes if a client

Question: General observations of client	
	needs assistance with these activities, and any challenges with the client's functional ability. Consider and record: • If the client has commented or mentioned any weakness or an inability to move a body part sufficiently. • If the client is experiencing any abnormal movements such as tremors, jerky movements or difficulty walking. • If the client easily loses balance or has trouble maintaining balance. • If the client has any swallowing difficulties, and/or feels like there is a lump in their throat. • Any identified day-to-day activities that the client has difficulty with. Prompts and/or observations: • Include your observations from the assessment about how the client manages their day-to-day activities. Do they have challenges moving around the house? Are they able to pick things up? • What are some the challenges that you experience with your day-to-day activities? • What are the key areas where you need some help? • What are some things that you used to do in recent years that you now find more challenging?

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Health literacy difficulties

Question: Health literacy difficulties	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • Health literacy is the ability to read, understand and use healthcare information to make informed decisions about

Question: Health literacy difficulties	

	health and have the ability to follow treatment instructions where required.
	• People who have low health literacy skills will experience difficulty with communication, resulting in a poor understanding of their condition, treatment options and choices of care. People with low levels of health literacy are one and a half times more likely to have an adverse health outcome than someone who is health literate.[2]
	• Health literacy affects a client's ability to:
	  ○ Share personal information, such as health history with assessors; and
	  ○ Navigate the healthcare system, including filling out complex forms and locating services or providers.
	
	<u>Consider and record:</u>
	
	• If the client is able to read health information, and complete any medical forms by themselves.
	• If the client is able to understand and follow information received during medical appointments.
	
	<u>Prompts and/or observations:</u>
	
	• Do you need someone to help you read health information?
	• Are you able to complete medical forms by yourself?
	• Do you have someone to attend your medical appointments with you? How do they support you during your appointments?
	
	<u>Recommendations:</u>
	
	• If you suspect the client has health literacy difficulties, it is recommended ensure you following the below steps throughout the access process.
	  ○ Use plain language (language the client can understand the first time they read or hear it)
	  ○ Ensure the client is supported at the assessment by a carer or support person

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[2] NSW Government, nd, 'Health Literacy', available at http://www.cec.health.nsw.gov.au/quality-improvement/people-and-culture/person-centred-care/health-literacy, accessed on 26 April 2018.

Question: Health literacy difficulties	
	○ Use a translator, interpreter or communication device if required. Support resources: • Health literacy | Australian Commission on Safety and Quality in Health Care • Supportive resources on health literacy | Australian Commission on Safety and Quality in Health Care • Patient related barriers | Australian Government Department of Health and Aged Care

Details of health literacy difficulties

Question: Details	
Response options	Textbox for written response
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • An assessor should summarise details of health literacy difficulties being experienced by the client. Consider and record: • Consider and record the: ○ Difficulties the client has with health literacy. ○ Impact on the client's ability to understand health information. ○ Support the client has and/or requires in order to understand and interpret health information. Prompts and/or observations: • How do you coordinate health appointments? • How do you find the information you need/want? • What do you find most difficult when seeking to understand information shared by health professionals?

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Question: Details	

	• Do you have someone to attend your medical appointments with you? How do they support you during your appointments?
	• Do you use the My Aged Care Client Record or My Health Record? (if applicable)
	
	Recommendations:
	
	• If you suspect the client has health literacy difficulties, it is recommended ensure you following the below steps throughout the access process.
	  ○ Use plain language (language the client can understand the first time they read or hear it)
	  ○ Ensure the client is supported at the assessment by a carer or support person
	  ○ Use a translator, interpreter or communication device if required.
	
	Support resources:
	
	• Health literacy | Australian Commission on Safety and Quality in Health Care
	• Supportive resources on health literacy | Australian Commission on Safety and Quality in Health Care
	• Patient related barriers | Australian Government Department of Health and Aged Care

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Get to places out of walking distance

Question: Get to places out of walking distance	
Response options	• Without help • With some help • Completely unable
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from triage (able to get places out of walking distances question)
Response guidance	Context:

Question: Get to places out of walking distance	

	• An assessor should identify whether the client can get to places out of walking distance.
	• This question is not used to consider the mode of transport a client uses, but whether they need physical assistance or supervision from another person with using public transport, getting to and from places away from home, and driving.
	
	<u>Consider and record:</u>
	
	• The response will pre-populate from triage, and the assessor may need to validate that this information is still correct.
	• Be mindful of asking the client to repeat their story again. It may be more appropriate to frame questions in a way that ask the client to expand on what they shared last time.
	• Consider cognitive as well as physical reasons for requiring assistance.
	• Use the below definitions to assist with the response.
	  ○ **Without help:** if the client can travel alone on business, taxis (including organising taxis) or drive their own car.
	  ○ **Completely unable:** if the client is completely unable to travel unless emergency arrangements are made for a specialised vehicle like an ambulance. The client requires assistance of more than one person or is not able to travel at all unless using emergency transport.
	  ○ **With some help:** if the client can only do so in some circumstances. These circumstances could include:
	  ▪ If they require assistance from a person (informally or formally)
	  ▪ If they possess a restricted driver's licence and are unable to attend appointments that are out of their restricted driving distance/local area
	
	<u>Prompts and/or observations:</u>
	
	• How do you manage to access your local community?

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Question: Get to places out of walking distance	
	• For example, when did you last visit a GP, have a medical appointment, attend a hairdresser, go shopping, visit friends/family? How did you get there and back? • How do you usually get to your local shops? • Are you able to walk to the local community/shops by yourself? • Can you organise a taxi by yourself?

Assistance to get places out of walking distance

Question: Who helps?	
Response options	• No one • Informal carer(s) • Aged care service provider(s) • Other
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	<u>Context:</u> • An assessor should identify if the client is supported to get to places out of walking distance. <u>Consider and record:</u> • If the client is receiving any assistance to get to places out of walking distance. <u>Prompts and/or observations:</u> • Does anyone help you get to the local community/shops? • For example, when you last visited a GP, had a medical appointment, attended a hairdresser, went shopping, visited friends/family did someone help you get there?

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Is the need to get places out of walking distance being met

Question: Is the need being met?	
Response options	• Completely unmet • Partially met

Question: Is the need being met?	
	• Completely met • Client does not require assistance
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Response guidance	<u>Context:</u>
	
	• An assessor should identify if the client feels their need to get to places out of walking distance is being met.
	
	<u>Consider and record:</u>
	
	• When responding to this question, consider the client's perception first. If necessary, investigate other considerations (for example, assessor and/or support person observations) if there appears to be a conflict between the client's perception of their needs and their actual needs.
	• Use the below definitions to assist with the response.
	  ○ **Completely unmet:** the client's needs are not being met.
	  ○ **Partially met:** some of the client's needs are being met and/or the client's needs are only being met some of the time.
	  ○ **Completely met:** the client's needs are sufficiently being met.
	  ○ **Client does not require assistance:** the client does not require any assistance to meet their needs.
	
	<u>Prompts and/or observations:</u>
	
	• Are you able to get to the local community whenever you need to?
	• What do you do if you need to travel somewhere out of walking distance?
	• How often are you unable to get to places outside of walking distance?

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Additional details on ability to get places out of walking distance

Question: Any additional details?	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • Any additional details identified when discussing the client's ability to get to places out of walking distance. Consider and record: • The frequency of any support. • If all of their needs are met within walking distance. • If they have no desire to travel to places out of walking distance.

Ability to drive

Question: Does the client drive?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

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Question: Does the client drive?	

Response guidance	Context:
	
	• An assessor should identify if the client is able to drive.
	• This question focuses on the client's capability to drive, rather than their appetite or need to drive.
	
	Consider and record:
	
	• Use the below definitions to assist with the response.
	  ○ **Yes:** the client has a driver's licence and is able to drive is all typical road conditions.
	  ○ **No:** the client is unable to, or not allowed to, drive.
	
	Prompts and/or observations:
	
	• Do you drive?
	• Do you have your driver's license, and do you continue to drive?
	• Are there any circumstances where you find it too difficult to drive?
	• Can you go out on your own, or does someone always help you?

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Who assists clients to get places out of walking distance if they do not drive

Question: If client does not drive, who assists the client to get to places out of walking distance?	
Response options	• Partner • Parent • Other family member (daughter, daughter-in-law, son-in-law, other relative) • Friend/neighbour • Taxi • Aged care service provider transport service •
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context:

Question: If client does not drive, who assists the client to get to places out of walking distance?	
	• An assessor should identify if the client is supported to get to places out of walking distance if they cannot drive. Consider and record: • Typical arrangements for the client to get to places out of walking distance. Prompts and/or observations: • Does someone drive you or do you use public transport or transport services when you need to go somewhere? • How do you normally go somewhere outside of walking distance? • Does someone drive you when you need to go somewhere? • Who drives you when you need to go somewhere?

Undertake light housework

Question: Are you able to undertake light housework?	
Response options	• Without help • With some help • Completely unable
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from triage (able to undertake housework question)
Response guidance	Context: • An assessor should determine whether the client can do light/basic housework. • Light housework includes dusting, dishwashing, washing clothes, cleaning out the fridge etc. Consider and record:

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Question: Are you able to undertake light housework?	

	• The response will pre-populate from triage, and the assessor may need to validate that this information is still correct.
	• Be mindful of asking the client to repeat their story again. It may be more appropriate to frame questions in a way that ask the client to expand on what they shared last time.
	• Consider the client's ability to do cleaning, dusting, and other simple house-keeping tasks.
	• Consider cognitive as well as physical reasons for requiring assistance.
	• Do not consider the client's ability to undertake heavier or more difficult housework, as this is covered as separate questions.
	• Use the below definitions to assist with the response.
	  ○ **Without help:** the client can maintain basic house-keeping tasks independently. For example, cleaning, washing dishes and vacuuming.
	  ○ **Completely unable:** the client is unable to participate in any housekeeping tasks.
	  ○ **With some help:** the client can do a few minor light housework tasks, but these are limited.
	
	<u>Prompts and/or observations:</u>
	
	• Observations should be considered. For example, does the client have difficulty bending or reaching? Does the person's home present as neat and tidy? Are the floors dirty or sticky? Is the bathroom and toilet dirty or mouldy? Are the client's clothes and bed linen dirty and/or do they smell?
	• What type of equipment do you use to complete the house cleaning?
	• Do you spread your housework over the day or week?
	• How do you manage with cleaning the bathroom? What equipment do you use?
	• Do you find it difficult bending or reaching?
	• How do you manage to take out the bins?

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Assistance with light housework

Question: Who helps?	
Response options	• No one • Informal carer(s) • Aged care service provider(s) • Other
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • An assessor should identify if the client is supported with light housework. Consider and record: • If the client is receiving any assistance with light housework. • This should include all sources of formal and informal support. Prompts and/or observations: • Does someone help you with housework? • Does someone help you with taking out the bins? • Do you have any carers or services to help you with housework?

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If need for light housework is being met

Question: Is the need being met?	
Response options	• Completely unmet • Partially met • Completely met • Client does not require assistance
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context:

Question: Is the need being met?	

	• An assessor should determine if the client feels their needs for light housework are being sufficiently met.
	
	Consider and record:
	
	• When responding to this question, consider the client's perception first. If necessary, investigate other considerations (for example, assessor and/or support person observations) if there appears to be a conflict between the client's perception of their needs and their actual needs.
	• Use the below definitions to assist with the response.
	  ○ **Completely unmet:** the client's needs are not being met.
	  ○ **Partially met:** some of the client's needs are being met and/or the client's needs are only being met some of the time.
	  ○ **Completely met:** the client's needs are sufficiently being met.
	  ○ **Client does not require assistance:** the client does not require any assistance to meet their needs.
	
	Prompts and/or observations:
	
	• Are you able to comfortably complete all your housework?
	• Do you require any assistance with your housework?

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Additional details on light housework

Question: Any additional details?	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • Any additional details identified when discussing the client's ability to undertake light housework. Consider and record:

Question: Any additional details?	
	• The frequency of any support. • If they choose to get assistance with light housework for other reasons (i.e. always paid for this service). • If current arrangements are sustainable. • Any incidents or issues flagged during the discussion with the client. <u>Prompts and/or observations:</u> • Are you able to comfortably complete all your housework? • Do you require any assistance with your housework? • Are current arrangements working and sustainable?

Undertake housework (heavy or moderate)

Question: Undertake housework (heavy/moderate)	
Response options	• Without help • With some help • Completely unable
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	<u>Context:</u> • An assessor should determine whether the client can do heavy or moderate housework. • Heavy housework includes removing the vacuum from the cupboard, changing the sheets on a bed etc. <u>Consider and record:</u> • Consider the client's ability to do cleaning, vacuuming, washing, change bed linen and other general house-keeping tasks. • Consider cognitive as well as physical reasons for requiring assistance. • Use the below definitions to assist with the response.

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Question: Undertake housework (heavy/moderate)	
	○ **Without help:** the client can maintain house-keeping tasks independently. For example, washing floors, vacuuming, changing bed linen etc. ○ **Completely unable:** the client is unable to participate in any heavy or moderate housekeeping tasks. ○ **With some help:** the client can do some heavy or moderate housing tasks but not all. <u>Prompts and/or observations:</u> • Observations should be considered. For example, does the client have difficulty bending or reaching? Does the person's home present as neat and tidy? Are the floors dirty or sticky? Is the bathroom and toilet dirty or mouldy? Are the client's clothes and bed linen dirty and/or do they smell? • How do you manage cleaning floors (vacuuming and mopping), taking out the bins, getting to the letterbox? • What type of equipment do you use to complete the house cleaning (for example, type of vacuum cleaner)? • Do you spread your housework over the day or week? • How do you manage with cleaning the bathroom? What equipment do you use? • How do you manage to change your bed linen? • How do you manage the washing, ironing and laundry? Is your washing machine a top or front loader? How do you manage to carry wet laundry to the clothesline? How do you manage to peg clothes on the line? Do you use a clothing stand in your home to dry wet laundry? • Do you find it difficult bending or reaching? • How do you manage to take out the bins? • Are current arrangements working and sustainable?

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Assistance with heavy or moderate housework

Question: Who helps?	
Response options	• No one • Informal carer(s) • Aged care service provider(s) • Other
Question rules	**Base question** that is mandatory to complete

Question: Who helps?	
Pre-populated information	No
Response guidance	Context: • An assessor should identify if the client is supported with heavy or moderate housework. Consider and record: • If the client is receiving any assistance with heavy or moderate housework. Prompts and/or observations: • Does someone help you with cleaning the bathroom? • Does someone help you to change your bed linen? • Does someone help you with the washing, ironing, and laundry?

If need for heavy or moderate housework is being met

Question: Is the need being met?	
Response options	• Completely unmet • Partially met • Completely met • Client does not require assistance
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • An assessor should determine if the client feels their needs for heavy or moderate housework are currently being met. Consider and record: • When responding to this question, consider the client's perception first. If necessary, investigate other considerations (for example, assessor and/or support person observations) if there appears to be a conflict

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Question: Is the need being met?	

	between the client's perception of their needs and their actual needs.
	• Use the below definitions to assist with the response.
	  ○ **Completely unmet:** the client's needs are not being met.
	  ○ **Partially met:** some of the client's needs are being met and/or the client's needs are only being met some of the time.
	  ○ **Completely met:** the client's needs are sufficiently being met.
	  ○ **Client does not require assistance:** the client does not require any assistance to meet their needs.
	
	<u>Prompts and/or observations:</u>
	
	• Are you able to comfortably clean your bathroom?
	• Are you able to comfortably change your bed linen?
	• Are you able to comfortably do the washing, ironing, and laundry?
	• Do you require any assistance with your housework?

Additional details on heavy or moderate housework

Question: Any additional details?	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	<u>Context:</u> • Any additional details identified when discussing the client's ability to undertake heavy or moderate housework. <u>Consider and record:</u> • The frequency of any support. • If the client receives help for other reasons (i.e. they have always paid/received for this type of assistance). • If current arrangements are sustainable.

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Question: Any additional details?	
	• If they live in an environment where there is a limited requirement for any heavy or moderate housework. • Any housework requirements outside of the house (i.e. maintaining gardens). • Any incidents or issues flagged during the discussion with the client. Prompts and/or observations: • Are you able to comfortably clean your bathroom? • Are you able to comfortably change your bed linen? • Are you able to comfortably do the washing, ironing, and laundry? • Do you require any assistance with your housework?

Go shopping

Question: Go shopping (assuming transportation)	
Response options	• Without help • With come help • Completely unable
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from triage (able to shop for groceries on own question)
Response guidance	Context: • An assessor should identify whether the client can go shopping for groceries or clothes, assuming they have transportation to get to the shops. Consider and record: • The response will pre-populate from triage, and the assessor may need to validate that this information is still correct. • Be mindful of asking the client to repeat their story again. It may be more appropriate to frame questions in a way that ask the client to expand on what they shared last time.

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Question: Go shopping (assuming transportation)	

	• Consider the client's ability to travel the distance required; to select and carry items (vision, reaching/bending ability) as well as cognition.
	• Use the below definitions to assist with the response.
	  ○ **Without help** the client can take care of all their shopping needs themselves once they are at the shops. This includes online shopping.
	  ○ **Completely unable:** the client is completely unable to participate in any shopping activities.
	  ○ **With some help:** the client needs someone to go with them on all shopping trips as they are unable to attend the shops themselves and need to be accompanied due to difficulty paying, reading labels, reaching and/or bending for items. This includes providing another person with a shopping list that they have prepared.
	
	<u>Prompts and/or observations:</u>
	
	• How do you manage to complete your shopping?
	• Where do you do your shopping?
	• How often do you go shopping?
	• How do you manage carrying the groceries?
	• Do you get anything home delivered?
	• Take note of the client's cupboards/pantry and fridge and the presence of food items; consider the expiry dates on food packages and milk/juice cartons; take note of the client's clothing (e.g.is it in good/poor condition).
	• Are current arrangements working and sustainable?

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Assistance with going shopping

Question: Who helps?	
Response options	• No one • Informal carer(s) • Aged care service provider(s) • Other
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	<u>Context:</u>

Question: Who helps?	
	• An assessor should determine if the client is supported to go shopping. Consider and record: • If the client is receiving any assistance to go shopping. Prompts and/or observations: • Does someone help you with your shopping? • Does someone go shopping with you? What do they help you with? • Do you get anything home delivered? • Does anyone help you with your home deliveries?

If need for shopping is being met

Question: Is the need being met?	
Response options	• Completely unmet • Partially met • Completely met • Client does not require assistance
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • An assessor should identify if the client feels their need to go shopping is being met. Consider and record: • When responding to this question, consider the client's perception first. If necessary, investigate other considerations (for example, assessor and/or support person observations) if there appears to be a conflict between the client's perception of their needs and their actual needs. • Use the below definitions to assist with the response.

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Question: Is the need being met?	
	○ **Completely unmet:** the client's needs are not being met. ○ **Partially met:** some of the client's needs are being met and/or the client's needs are only being met some of the time. ○ **Completely met:** the client's needs are sufficiently being met. ○ **Client does not require assistance:** the client does not require any assistance to meet their needs. <u>Prompts and/or observations:</u> • Do you feel like you are able to shop when you need to? • How many times have you been unable to shop when required? • Do you feel that you require more support with your shopping?

Additional details on shopping

Question: Any additional details?	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	<u>Context:</u> • Any additional details identified when discussing the client's ability to go shopping. <u>Consider and record:</u> • The frequency of any support. • If current arrangements are sustainable. • If there are things they feel they need to 'go without' due to limitations on their ability to go shopping. • What they find easy and what they find hard. • Any incidents or issues flagged during the discussion with the client.

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Question: Any additional details?	
	Prompts and/or observations: • When have you been unable to shop when required? • Why have you been unable to shop when required? • Do you feel that you require more support with your shopping?

Prepare meals

Question: Prepare meals	
Response options	• Without help • With some help • Completely unable
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from triage (able to prepare meals question)
Response guidance	Context: • An assessor should identify whether the client can prepare their own meals, including the delivery of prepared meals, help with meal preparation and managing basic nutrition. Consider and record: • The response will pre-populate from triage, and the assessor may need to validate that this information is still correct. • Be mindful of asking the client to repeat their story again. It may be more appropriate to frame questions in a way that ask the client to expand on what they shared last time. • Consider cognitive as well as physical reasons for requiring assistance. • Use the below definitions to assist with the response. ○ **Without help:** the client is able to plan and cook full meals themselves. This includes heating pre-prepared meals for convenience.

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Question: Prepare meals	
	○ **Completely unable:** the client is completely unable to participate in any activities associated with meal preparation. ○ **With some help:** the client can prepare some things but they are unable to cook full meals themselves. For example, they are able to prepare cups of tea and coffee with toast/biscuits, light meals such as sandwiches, heating/reheating pre-prepared meals. <u>Prompts and/or observations:</u> • A person with dementia may lack the organisational skills to prepare a meal or is at risk of scalding themselves or leaving the stove on. • A person may have difficulty standing to prepare meals or lack the dexterity to cut food. • How do you manage to prepare your meals? • What do you prepare and eat day-to-day? • How many meals do you prepare for yourself day-to-day? • Do you prepare and freeze meals for reheating at a later date? • Do you stand or sit to prepare meals? • Observations should be considered. For example, does the client have pre-prepared or frozen meals in the fridge/freezer? Does the person present as malnourished or overweight? Is the gas/electric stove and oven in working order and does it appear to have been used? Is a microwave present? Consider asking the client to demonstrate how they use the kettle, stove, oven and/or microwave. • Are current arrangements working and sustainable?

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Assistance with prepare meals

Question: Who helps?	
Response options	• No one • Informal carer(s) • Aged care service provider(s) • Other
Question rules	**Base question** that is mandatory to complete

Question: Who helps?	
Pre-populated information	No
Response guidance	Context: • An assessor should identify if the client is supported with preparing meals. Consider and record: • If the client is receiving any assistance to prepare meals. Prompts and/or observations: • Does anyone help you prepare meals? • Do you have any services in place that prepare meals for you?

If need for preparing meals is being met

Question: Is the need being met?	
Response options	• Completely unmet • Partially met • Completely met • **Client does not require assistance**
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • An assessor should identify if the client feels their needs for preparing meals are being met. Consider and record: • When responding to this question, consider the client's perception first. If necessary, investigate other considerations (for example, assessor and/or support person observations) if there appears to be a conflict between the client's perception of their needs and their actual needs.

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Question: Is the need being met?	

	• Use the below definitions to assist with the response.
	  ○ **Completely unmet:** the client's needs are not being met.
	  ○ **Partially met:** some of the client's needs are being met and/or the client's needs are only being met some of the time.
	  ○ **Completely met:** the client's needs are sufficiently being met.
	  ○ **Client does not require assistance:** the client does not require any assistance to meet their needs.
	
	Prompts and/or observations:
	
	• Have you been unable to prepare meals?
	• Are you comfortable preparing your own meals?
	• Do you feel like you require any supports to prepare meals?

Additional details on preparing meals

Question: Any additional details?	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • Any additional details identified when discussing the client's ability to prepare meals. Consider and record: • The frequency of any support. • If current arrangements are sustainable. • If the client is happy with their meals. • If typical meals are appropriate (i.e. sufficient and nutritious). • Any incidents or issues flagged during the discussion with the client.

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Question: Any additional details?	
	Prompts and/or observations: • Are you happy with current arrangements? • Are you happy with your typical meals? • Are there sometimes impacts on your ability to prepare meals or receive help?

Take medicine

Question: Take medicine	
Response options	• Without help • With some help • Completely unable
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Response guidance	Context:
	
	• An assessor should determine whether the client can take their own medication or administer injections.
	
	Consider and record:
	
	• Consider cognitive as well as physical reasons. For example, a client may have a visual impairment and be unable to read labels correctly or have arthritic hands that cause difficulty opening medication packets/bottles.
	• Use the below definitions to assist with the response.
	  ○ **Without help:** the client is able to take their medication in the right doses at the right time (self-medicates).
	  ○ **Completely unable:** the client is not capable of organising, dispensing or taking their own medication and/or has compliance issues with their medication regime.
	  ○ **With some help:** the client is able to take their medication if someone prepares it for them and/or reminds them to take it (i.e. using a dosette box or blister pack). This includes prompting the client to take or dispense medication due to memory difficulties or confusion.

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Question: Take medicine	
	Prompts and/or observations: • Do you have a pill box or blister pack? • How do you go about taking your medications? • Do you have any difficulties using a dosette box/blister pack? • Observations should be considered. For example, are there loose pills lying on the counter/floor?

Assistance with taking medicine

Question: Who helps?	
Response options	• No one • Informal carer(s) • Aged care service provider(s) • Other
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • An assessor should identify if the client is supported with taking medicine. Consider and record: • If the client is receiving any assistance to take medicine. Prompts and/or observations: • Does someone help you fill your pill box or blister pack? • Does someone help you take your medications? • Does someone help you administer injections? • Do you have someone to remind you to take your medication daily? • Are current arrangements working and sustainable?

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If need for taking medicine is being met

Question: Is the need being met?	
Response options	• Completely unmet • Partially met • Completely met • Client does not require assistance
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Response guidance	Context:
	
	• An assessor should identify if the client's needs for taking medicine are being met.
	
	Consider and record:
	
	• When responding to this question, consider the client's perception first. If necessary, investigate other considerations (for example, assessor and/or support person observations) if there appears to be a conflict between the client's perception of their needs and their actual needs.
	• Use the below definitions to assist with the response.
	  ○ **Completely unmet:** the client's needs are not being met.
	  ○ **Partially met:** some of the client's needs are being met and/or the client's needs are only being met some of the time.
	  ○ **Completely met:** the client's needs are sufficiently being met.
	  ○ **Client does not require assistance:** the client does not require any assistance to meet their needs.
	
	Prompts and/or observations:
	
	• Are you able to take your medication on your own?
	• Are you comfortable with taking your own medication consistently?
	• Do you miss your medication regularly? How often?
	• Do you require any additional support to take your medication consistently?

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Additional details on taking medicine

Question: Any additional details?	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • Any additional details identified when discussing the client's ability to take medicine. Consider and record: • The frequency of any support. • Any concerns that the client may not be sufficiently managing to take medicine. • If current arrangements are sustainable. • Any incidents or issues flagged during the discussion with the client. Prompts and/or observations: • Do you require any additional support to take your medication consistently? • How often do you forget to take your medication?

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Handle money

Question: Handle money	
Response options	• Without help • With some help • Completely unable
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context:

Question: Handle money	

	• An assessor should determine whether the client can handle their own money.
	• It is not used to record if they can physically get to the bank.
	
	<u>Consider and record:</u>
	
	• Consider cognitive as well as physical reasons. For example, a client may not be able to manage their budget and pay bills reliably, but they are able to pay for their groceries.
	• Use the below definitions to assist with the response.
	  ○ **Without help:** the client manages their own finances. For example, income, banking, bill paying and cheque writing. This includes using direct debit for convenience.
	  ○ **Completely unable:** the client is not capable of handling money or finances.
	  ○ **With some help:** the client manages the day-to-day buying and expenses but needs assistance with banking, managing cheque books, bill paying, and/or major purchases.
	
	<u>Prompts and/or observations:</u>
	
	• How do you manage day-to-day buying of groceries?
	• How do you pay your bills?
	• Take note of whether there are unpaid bills lying around the client's home or ask them to show you a recent bill that they have paid or had debited. If they paid the bill themselves, ask how they did this.
	• Are current arrangements working and sustainable?

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Assistance with handling money

Question: Who helps?	
Response options	• No one • Informal carer(s) • Aged care service provider(s) • Other
Question rules	**Base question** that is mandatory to complete

Question: Who helps?	
Pre-populated information	No

Response guidance	Context:
	• An assessor should identify if the client is supported with handling money.
	
	Consider and record:
	• If the client is receiving any assistance with handling money.
	
	Prompts and/or observations:
	• Does anyone help you manage your day to day buying of groceries?
	• Does someone help you pay your bills?
	• Do you have someone helping you manage your finances?
	
	Support resources:
	• Responses to this question may raise some potential areas of concern on financial abuse that could need exploring further:
	  ○ Powers of attorney and financial abuse of older people in Australia | Australian Institute of Family Studies (aifs.gov.au)
	  ○ National hotline: 1800 Elder Help

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If need for handling money is being met

Question: Is the need being met?	
Response options	• Completely unmet • Partially met • Completely met • Client does not require assistance
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context:

Question: Is the need being met?	

	• An assessor should identify if the client's needs to manage money is being met.
	
	<u>Consider and record:</u>
	
	• When responding to this question, consider the client's perception first. If necessary, investigate other considerations (for example, assessor and/or support person observations) if there appears to be a conflict between the client's perception of their needs and their actual needs.
	• Use the below definitions to assist with the response.
	  ○ **Completely unmet:** the client's needs are not being met.
	  ○ **Partially met:** some of the client's needs are being met and/or the client's needs are only being met some of the time.
	  ○ **Completely met:** the client's needs are sufficiently being met.
	  ○ **Client does not require assistance:** the client does not require any assistance to meet their needs.
	
	<u>Prompts and/or observations:</u>
	
	• Do you feel like you have full control over handling your money?
	• Do you need any supports with handling your money?
	• Do you need someone to help you manage your bills?
	• Do you need someone to help you manage your day to day groceries?

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Additional details on handling money

Question: Any additional details?	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No

Question: Any additional details?	
Response guidance	Context: • Any additional details identified when discussing the client's ability to handle money. Consider and record: • The frequency of any support. • Circumstances where some needs are being met and other needs are not being met. • If current arrangements are sustainable. • Any incidents or issues flagged during the discussion with the client. Prompts and/or observations: • What supports do you need with handling your money? • How can someone support you with handling your money?

Use the telephone

Question: Use telephone	
Response options	• Without help • With some help • Completely unable
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • An assessor should identify whether the client can use a telephone. Consider and record: • Consider cognitive as well as physical reasons for requiring assistance. • Use the below definitions to assist with the response. ○ **Without help:** if the client owns and can use their telephone when required.

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Question: Use telephone	
	○ **Completely unable:** if the client is not capable of using a telephone. ○ **With some help:** if the client does not own a telephone and/or has no need to use a telephone, but would be capable of using one. Alternatively, if a client can only use a telephone in some circumstances (i.e. with some minor assistance). Prompts and/or observations: • Do you use your telephone? • How often do you use your telephone? • Are current arrangements working and sustainable?

Assistance with using a telephone

Question: Who helps?	
Response options	• No one • Informal carer(s) • Aged care service provider(s) • Other
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • An assessor should determine if the client is supported to use a telephone. Consider and record: • If the client is receiving any assistance use a telephone. Prompts and/or observations: • Does someone help you to use your telephone?

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If need to use a telephone is being met

Question: Is the need being met?	
Response options	• Completely unmet • Partially met • Completely met • Client does not require assistance
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Response guidance	Context:
	
	• If the client feels their needs to use a telephone are being met.
	
	Consider and record:
	
	• When responding to this question, consider the client's perception first. If necessary, investigate other considerations (for example, assessor and/or support person observations) if there appears to be a conflict between the client's perception of their needs and their actual needs.
	• Use the below definitions to assist with the response.
	  ○ **Completely unmet:** the client's needs are not being met.
	  ○ **Partially met:** some of the client's needs are being met and/or the client's needs are only being met some of the time.
	  ○ **Completely met:** the client's needs are sufficiently being met.
	  ○ **Client does not require assistance:** the client does not require any assistance to meet their needs.
	
	Prompts and/or observations:
	
	• Do you feel like you are able to use the telephone when required?
	• Do you need any support to use your telephone?
	• Have you ever been unable to use a phone when required?

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Additional details on using a telephone

Question: Any additional details?	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • Any additional details identified when discussing the client's ability to use a telephone. Consider and record: • The frequency of any support. • If current arrangements are sustainable. • If there are any safety concerns due to an inability to use a telephone. • Any incidents or issues flagged during the discussion with the client. Prompts and/or observations: • How can someone assist you with using the telephone? • What supports do you need to use your telephone?

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Use of other communication devices

Question: Use other communication device/s	
Response options	• Without help • With some help • Completely unable
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • An assessor should identify if the client is able to use other communication devices.

Question: Use other communication device/s	

	• Other communication devices include items such as a computer, a mobile phone, a tablet that can be used to communicate with other people.
	
	<u>Consider and record:</u>
	
	• Consider cognitive as well as physical reasons for requiring assistance.
	• Use the below definitions to assist with the response.
	  ○ **Without help:** if the client owns and can use their communication device when required.
	  ○ **Completely unable:** if the client is not capable of using a communication device.
	  ○ **With some help:** if the client does not own a communication device and/or has no need to use a communication device, but would be capable of using one. Alternatively, if a client can only use a communication device in some circumstances (i.e. with some minor assistance).
	
	<u>Prompts and/or observations:</u>
	
	• Do you use any other communication devices other than a telephone?
	• Other than a telephone, do you use any communication devices such as a tablet/iPad?
	• Are current arrangements working and sustainable?

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Assistance with using other communication device/s

Question: Who helps?	
Response options	• No one • Informal carer(s) • Aged care service provider(s) • Other
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	<u>Context:</u>

Question: Who helps?	
	• An assessor should determine if the client is supported to use a communication device/s. Consider and record: • If the client is receiving any assistance to use a communication device/s. Prompts and/or observations: • Does someone help you use your device? • Do you have someone who assists you with using your device?

If need for using other communication device/s is being met

Question: Is the need being met?	
Response options	• Completely unmet • Partially met • Completely met • Client does not require assistance
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • An assessor should determine if the client feels their needs are being met to use a communication device/s. Consider and record: • When responding to this question, consider the client's perception first. If necessary, investigate other considerations (for example, assessor and/or support person observations) if there appears to be a conflict between the client's perception of their needs and their actual needs. • Use the below definitions to assist with the response. ○ **Completely unmet:** the client's needs are not being met.

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Question: Is the need being met?	
	○ **Partially met:** some of the client's needs are being met and/or the client's needs are only being met some of the time. ○ **Completely met:** the client's needs are sufficiently being met. ○ **Client does not require assistance:** the client does not require any assistance to meet their needs. Prompts and/or observations: • Do you require any help with using your device? • Have you been unable to use your device when you need to use it? • Do you feel like you are able to use your device when required?

Additional details on using other communication device/s

Question: Any additional details?	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • Any additional details identified when discussing the client's ability to use a communication device/s. Consider and record: • The frequency of any support. • Which communication devices they can and cannot use. • If current arrangements are sustainable. • If there are any safety concerns due to an inability to use a telephone. • Any incidents or issues flagged during the discussion with the client. Prompts and/or observations: • What supports do you require to use your device?

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Question: Any additional details?	
	• How can someone help you to use your device whenever required?

Use online services

Question: Use online services	
Response options	• Without help • With some help • Completely unable
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Response guidance	<u>Context:</u>
	
	• An assessor should identify whether the client is able to use online services.
	• Online services are any information and services provided over the internet. Online services not only allow people to communicate with each other, but they also provide access to information. Online services can range from simple to complex: the use of a search engine or managing finances.
	
	<u>Consider and record:</u>
	
	• Consider cognitive as well as physical reasons for requiring assistance.
	• Use the below definitions to assist with the response.
	  ○ **Without help:** if the client is able to use some online services.
	  ○ **Completely unable:** if the client is unable to use any online services.
	  ○ **With some help:** if the client does not have access to online services, but could use these services if required. Alternatively, if the client can use online services with some assistance.
	
	<u>Prompts and/or observations:</u>
	
	• Are you able to use the internet?

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Question: Use online services	
	• Do you use any online services? • Are current arrangements working and sustainable?

Assistance with using online services

Question: Who helps?	
Response options	• No one • Informal carer(s) • Aged care service provider(s) • Other
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • An assessor should identify if the client is supported with using online services. Consider and record: • If the client is receiving any assistance to use online services. Prompts and/or observations: • Does someone help you use your online services?

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If need for using online services is being met

Question: Is the need being met?	
Response options	• Completely unmet • Partially met • Completely met • Client does not require assistance
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context:

Question: Is the need being met?	

	• An assessor should identify if the client feels their need to use online services is being met.
	
	Consider and record:
	
	• When responding to this question, consider the client's perception first. If necessary, investigate other considerations (for example, assessor and/or support person observations) if there appears to be a conflict between the client's perception of their needs and their actual needs.
	• Use the below definitions to assist with the response.
	  ○ **Completely unmet:** the client's needs are not being met.
	  ○ **Partially met:** some of the client's needs are being met and/or the client's needs are only being met some of the time.
	  ○ **Completely met:** the client's needs are sufficiently being met.
	  ○ **Client does not require assistance:** the client does not require any assistance to meet their needs.
	
	Prompts and/or observations:
	
	• Do you require any support when using online services?
	• Are you able to access using your online services when required?
	• Have you ever been unable to access your online services when required?

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Additional details on using online services

Question: Any additional details?	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context:

Question: Any additional details?	
	• Any additional details identified when discussing the client's ability to use online services. Consider and record: • The frequency of any support. • If they have an appetite to learn more. • If current arrangements are sustainable. • If there are any safety concerns due to an inability to use a communication device. • Any incidents or issues flagged during the discussion with the client. Prompts and/or observations: • What supports do you need to access online services? • Can you tell me more about how you can be better supported when using your online services?

Ability to walk

Question: Walk	
Response options	• Without help • With some help • Completely unable
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from triage (ability to walk question)
Response guidance	Context: • An assessor should determine whether the client can walk. • In their response, an assessor should consider difficulties with indoor, outdoor and community mobility. Consider and record:

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Question: Walk	

	• The response will pre-populate from triage, and the assessor may need to validate that this information is still correct.
	• Be mindful of asking the client to repeat their story again. It may be more appropriate to frame questions in a way that ask the client to expand on what they shared last time.
	• Consider difficulties around the home (indoors and outdoors) or away from home (community mobility).
	• Consider cognitive as well as physical reasons for requiring assistance.
	• Use the below definitions to assist with the response.
	  ○ **Without help:** the client walks with no walking aids or is independent with mobility using a walking stick or similar.
	  ○ **Completely unable:** the client is wheelchair bound and is unable to self-propel, is bed bound or needs assistance of more than one person to mobilise.
	  ○ **With some help:** the client:
	  ▪ Uses a walking stick but it is not meeting their needs and the client is at risk of falling;
	  ▪ Walks with the assistance of one other person and/or uses a walking frame, crutches or aids that require the use of both arms;
	  ▪ Walks with a quad stick or one crutch and is reliant on this aid for mobility at all times;
	  ▪ Has foot problems (such as overgrown/ingrown toenails, calluses, bunions, amputations) that impact on their ability to walk;
	  ▪ Has breathing problems and/or uses oxygen that impacts on and limits their mobility; and/or
	  ▪ Uses a wheelchair without the help of others (able to self- propel a manual wheelchair or use an electric wheelchair).
	
	<u>Prompts and/or observations:</u>
	
	• Ask the client about their mobility around the house, garden and community.
	• Where do you walk to?
	• How far can you walk? (50m or 200m)

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Question: Walk	
	• How long can you walk for? (10 or 20 minutes) • How often do you walk? • Do you use any aids to assist with walking? (walk without aids, use a walking stick, walking frame, wheelchair [manual/electric] or other aid?) • How confident are you getting around your home – is there anything that slows you down or bothers you? • Do other health matters (such as breathing, strength, arthritis or medication) affect your mobility? If so, how? • Do you limit activity for fear of falling? • Take note of how the client walks and moves around their home and whether they experience pain or difficulty when walking in and out of the front and back doors, stairs, the bathroom and toilet, the bedroom, kitchen and laundry and any other rooms that they use. • Observe the condition of the equipment, for example the height and tip of their walking stick; the sturdiness of their walking frame; the tyres, brakes and seat on their wheelchair; other aids. Is the equipment suitable and safe for the person? • Are current arrangements working and sustainable?

Assistance with walking

Question: Who helps?	
Response options	• No one • Informal carer(s) • Aged care service provider(s) • Other
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	<u>Context:</u> • An assessor should identify if the client is provided any support with walking. • This question should only consider assistance from other people, rather than support through a wheelchair. <u>Consider and record:</u>

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Question: Who helps?	
	• If the client is receiving any assistance from anyone with walking. <u>Prompts and/or observations:</u> • When you need to walk do you have someone who helps you get around? • Do you have any family, friends or service providers who help you walk around?

If need for walking is being met

Question: Is the need being met?	
Response options	• Completely unmet • Partially met • Completely met • Client does not require assistance
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Response guidance	<u>Context:</u>
	
	• An assessor should determine if the client feels their needs are being met.
	
	<u>Consider and record:</u>
	
	• When responding to this question, consider the client's perception first. If necessary, investigate other considerations (for example, assessor and/or support person observations) if there appears to be a conflict between the client's perception of their needs and their actual needs.
	• Use the below definitions to assist with the response.
	  ○ **Completely unmet:** the client's needs are not being met.
	  ○ **Partially met:** some of the client's needs are being met and/or the client's needs are only being met some of the time.
	  ○ **Completely met:** the client's needs are sufficiently being met.

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Question: Is the need being met?	
	○ **Client does not require assistance:** the client does not require any assistance to meet their needs. Prompts and/or observations: • Do you need any support when you require to walk? • Do you feel that you are able to walk whenever required? • Have you ever felt like you have been unable to walk when required? • Do you often avoid walking for fear of falling? • Do other health matters (such as breathing, strength, arthritis or medication) affect your mobility? If so, how? • Do you limit activity for fear of falling?

Additional details on walking

Question: Any additional details?	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • Any additional details identified when discussing the client's ability to walk. Consider and record: • The frequency of any support. • If current arrangements are sustainable. • If there are any safety concerns due to an inability to walk. • Any incidents or issues flagged during the discussion with the client. Prompts and/or observations: • What specific supports would assist you with your walking needs? • What supports do you think will help build your confidence to walk as much as required?

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Wheelchair mobility

Question: Wheelchair mobility	
Response options	• Without help • With some help • Completely unable
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • An assessor should identify whether the client uses a wheelchair for mobility. Consider and record: • Consider cognitive as well as physical reasons for requiring assistance. • Use the below definitions to assist with the response. ○ **Without help:** if the client is able to use a wheelchair ○ **Completely unable:** if the client is unable to use a wheelchair or does not require a wheelchair. ○ **With some help:** if the client can only use a wheelchair in some circumstances (i.e. with assistance from others) Prompts and/or observations: • Do you require a wheelchair to assist with walking? • Do you use your wheelchair frequently as a walking aid? • Are current arrangements working and sustainable?

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Assistance with wheelchair mobility

Question: Who helps?	
Response options	• No one • Informal carer(s) • Aged care service provider(s) • Other

Question: Who helps?	
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • An assessor should identify if the client is supported to use a wheelchair. Consider and record: • If the client is receiving any assistance to use a wheelchair. Prompts and/or observations: • Does someone help you with your wheelchair? • Are you fully comfortable with using your wheelchair on your own? • Does a family, friend or service provider support you with your wheelchair mobility?

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If need for wheelchair mobility is being met

Question: Is the need being met?	
Response options	• Completely unmet • Partially met • Completely met • Client does not require assistance
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • An assessor should determine if the client feels their needs for wheelchair mobility are being met. Consider and record: • When responding to this question, consider the client's perception first. If necessary, investigate other considerations (for example, assessor and/or support

Question: Is the need being met?	

	person observations) if there appears to be a conflict between the client's perception of their needs and their actual needs.
	• Use the below definitions to assist with the response.
	  ○ **Completely unmet:** the client's needs are not being met.
	  ○ **Partially met:** some of the client's needs are being met and/or the client's needs are only being met some of the time.
	  ○ **Completely met:** the client's needs are sufficiently being met.
	  ○ **Client does not require assistance:** the client does not require any assistance to meet their needs.
	
	<u>Prompts and/or observations:</u>
	
	• Do you require any support when using your wheelchair?
	• Are there any challenges with using your wheelchair, where you would require any support?
	• Are you fully comfortable using your wheelchair to get around?

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Additional details on using wheelchair mobility

Question: Any additional details?	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	<u>Context:</u> • Any additional details identified when discussing wheelchair mobility with the client. <u>Consider and record:</u> • The frequency of any support. • If current arrangements are sustainable. • If there are any safety concerns. • Any incidents or issues flagged during the discussion with the client.

Question: Any additional details?	
	Prompts and/or observations: • What are the supports you require when using your wheelchair? • What are the challenges with using your wheelchair, where you would require any support?

Ability to climb stairs

Question: Climb stairs	
Response options	• Without help • With some help • Completely unable
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Response guidance	Context:
	
	• An assessor should identify whether the client is able to climb stairs.
	
	Consider and record:
	
	• Consider cognitive as well as physical reasons for requiring assistance.
	• Use the below definitions to assist with the response.
	  ○ **Without help:** if the client is able to climb stairs.
	  ○ **Completely unable:** if the client is unable to climb any stairs.
	  ○ **With some help:** if the client can climb one or two stairs only, or can only climb stairs in the right settings (with handrails etc.).
	
	Prompts and/or observations:
	
	• Ask the client about their mobility around the house and if there are any stairs, they are required to climb whether it is at home, at someone else's home or anywhere in the local community they attend.

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Question: Climb stairs	
	• Are you comfortable with walking up and down a flight of stairs? • How confident are you getting around stairs? • Do you avoid places that only have stairs as options? • Do you feel any breathlessness when walking up stairs?

Assistance with climbing stairs

Question: Who helps?	
Response options	• No one • Informal carer(s) • Aged care service provider(s) • Completely unable
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	<u>Context:</u> • An assessor should determine if the client is supported to climb stairs. <u>Consider and record:</u> • If the client is receiving any assistance to climb stairs. <u>Prompts and/or observations:</u> • When walking upstairs do you require any assistance? • Does someone help you when you are required to climb stairs? • Do family, friends or service providers help when you walk upstairs? • Are current arrangements working and sustainable?

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If need for climbing stairs is being met

Question: Is the need being met?	
Response options	• Completely unmet • Partially met • Completely met

Question: Is the need being met?	
	• Client does not require assistance
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Response guidance	Context:
	
	• An assessor should identify if the client feels their need to climb stairs is being met.
	
	Consider and record:
	
	• When responding to this question, consider the client's perception first. If necessary, investigate other considerations (for example, assessor and/or support person observations) if there appears to be a conflict between the client's perception of their needs and their actual needs.
	• Use the below definitions to assist with the response.
	  ○ **Completely unmet:** the client's needs are not being met.
	  ○ **Partially met:** some of the client's needs are being met and/or the client's needs are only being met some of the time.
	  ○ **Completely met:** the client's needs are sufficiently being met.
	  ○ **Client does not require assistance:** the client does not require any assistance to meet their needs.
	
	Prompts and/or observations:
	
	• Are you able to climb stairs comfortably on your own?
	• Do you require any assistance when climbing stairs?
	• Do you regularly avoid stairs as you do not feel comfortable climbing stairs on your own?
	• Do you often find that you are unable to climb stairs when required?
	• Do you often find yourself requiring assistance when climbing up stairs?

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Additional details on climbing stairs

Question: Any additional details?	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • Any additional details identified when discussing the client's ability to climb stairs. Consider and record: • If current arrangements are sustainable. • If there are any safety or hygiene concerns. • Any incidents or issues flagged during the discussion with the client. Prompts and/or observations: • What supports do you require when climbing upstairs? • How often do you feel like you are unable to climb stairs? • After how many steps do you feel out of breath or unable to climb stairs? • What are the challenges you have climbing upstairs?

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Take a bath or shower

Question: Take a bath or shower	
Response options	• Without help • With some help • Completely unable
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from triage (able to take a bath or shower question)
Response guidance	Context:

Question: Take a bath or shower	

	• An assessor should identify whether a client requires assistance, supervision or prompting from another person to shower, bath or bathe themselves.
	
	<u>Consider and record:</u>
	
	• The response will pre-populate from triage, and the assessor may need to validate that this information is still correct.
	• Be mindful of asking the client to repeat their story again. It may be more appropriate to frame questions in a way that ask the client to expand on what they shared last time.
	• Consider cognitive as well as physical reasons. A client with dementia may be physically able to shower, but may require prompting by their carer.
	• Use the below definitions to assist with the response.
	  ○ **Without help:** the client is able to prepare for and shower/dry themselves, including with the use of grab rails and adaptive equipment. This includes managing to bath, shower and dry themselves independently as often as they require without additional physical, verbal or standby assistance.
	  ○ **Completely unable:** the client needs total assistance with preparing and washing/drying themselves; utilises bed sponges only.
	  ○ **With some help:** the client needs help getting in or out of the bath/shower. This includes:
	  ▪ Hands-on assistance, supervision or prompting of one person when getting in and out of the shower or bath, on and off equipment such as a bath chair, assistance with washing and drying, difficulty regulating water temperature;
	  ▪ If a client is anxious regarding showering/bathing and requires standby assistance only; and/or
	  ▪ If they use equipment and require help to transfer on/off or to use any of the equipment.
	
	<u>Prompts and/or observations:</u>

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Question: Take a bath or shower	
	• How do you feel about me looking at your bathroom? • Are you able to bathe and shower yourself? Do you find any aspects difficult, such as reaching to wash your hair or feet? • How do you plan and prepare for your shower/bath? • Does the bathroom have adequate water pressure and temperature control? • Do you have any difficulties turning taps or checking the temperature of the water? • Is your bath/shower easily accessible? Where do you hold on for stability? • Do you feel confident with your ability to balance whilst washing yourself? • Are you able to apply creams or powders on yourself? • Can you clean your teeth/dentures effectively? • Do you have any difficulties with foot and nail care? • Take note of whether the shower or bath has been used recently; whether the client's personal appearance and clothing presents as neat or untidy; does their appearance validate what they have told you? Are there odours throughout the house or on the client that indicate difficulties with personal care? Are there grab rails for support if needed? Is there a handheld shower or shower chair present? Is there a slip resistant mat in the bathroom/bath/shower? Does the client use any aids to wash, dry or groom themselves? • Are current arrangements working and sustainable?

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Assistance with taking a bath or shower

Question: Who helps?	
Response options	• No one • Informal carer(s) • Aged care service provider(s) • Other
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context:

Question: Who helps?	
	• An assessor should determine if the client is supported to take a bath or have a shower. Consider and record: • If the client is receiving any assistance with taking a bath or having a shower. Prompts and/or observations: • Do you have someone who helps you bathe and shower? • Does a family member, friend or service provider help you bathe or shower?

If need for taking a bath or shower is being met

Question: Is the need being met?	
Response options	• Completely unmet • Partially met • Completely met • Client does not require assistance
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • An assessor should identify if the client feels their need to take a bath or have a shower is being met. Consider and record: • When responding to this question, consider the client's perception first. If necessary, investigate other considerations (for example, assessor and/or support person observations) if there appears to be a conflict between the client's perception of their needs and their actual needs. • Use the below definitions to assist with the response. ○ **Completely unmet:** the client's needs are not being met.

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Question: Is the need being met?	
	○ **Partially met:** some of the client's needs are being met and/or the client's needs are only being met some of the time. ○ **Completely met:** the client's needs are sufficiently being met. ○ **Client does not require assistance:** the client does not require any assistance to meet their needs. <u>Prompts and/or observations:</u> • Are you comfortable bathing and showering on your own whenever required? • Have there been times when you were unable to bathe or shower when required? • Do you often find bathing and showering challenging? • Do you have any difficulties with bathing and showering? • Are you fully comfortable with bathing and showering on your own? • Do you feel confident with your ability to balance whilst washing yourself?

Additional details on taking a bath or shower

Question: Any additional details?	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	<u>Context:</u> • Any additional details identified when discussing the client's ability to take a bath or have a shower. <u>Consider and record:</u> • The frequency of any support. • If current arrangements are sustainable. • If there are any safety or hygiene concerns. • Any incidents or issues flagged during the discussion with the client.

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Question: Any additional details?	
	Prompts and/or observations: • What are the challenges of bathing and showering yourself? • What supports do you require to bathe and shower confidently? • Can you please describe some of the challenges you have with bathing and showering? • Tell me about your current challenges with bathing and showering. • If the client appears to have a clean or tidy appearance.

Ability to dress

Question: Dressing	
Response options	• Without help • With some help • Completely unable
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • Response will pre-populate from triage (able to dress question)
Response guidance	Context: • An assessor should identify whether the client can dress themselves into their clothes. Consider and record: • The response will pre-populate from triage, and the assessor may need to validate that this information is still correct. • Be mindful of asking the client to repeat their story again. It may be more appropriate to frame questions in a way that ask the client to expand on what they shared last time. • Consider cognitive as well as physical reasons. A client with dementia may be physically able to dress, but may require prompting to do so, or a carer may also need to physically

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Question: Dressing	

	assist a client who is unable to 'sequence' their dressing tasks.
	• Use the below definitions to assist with the response.
	  ○ **without help:** the client is able to choose their clothing and is appropriately dressed, is able to do up their own buttons, zips, laces and/or put on their shoes/socks/stockings etc.
	  ○ **Completely unable:** the client is completely unable to dress themselves.
	  ○ **With some help:** the client is able to dress with some assistance and/or prompting. This may include assistance to choose clothing, or to do up their own buttons, zips, laces and/or put on their shoes/socks/stockings etc.
	
	<u>Prompts and/or observations:</u>
	
	• Are you able to choose your own clothing?
	• How do you decide to choose what to wear?
	• Do you have any difficulties in dressing or undressing (including dressing/undressing to use the toilet)?
	• Do you have any difficulties doing up buttons, zips, bra, tying shoelaces?
	• Do you have difficulty putting on or taking off shoes, socks, stockings etc.?
	• Is the client dressed in appropriate clothing? Does the outfit match? Are buttons, zips, shoelaces done up appropriately? Does their appearance validate what they have told you?
	• Are current arrangements working and sustainable?

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Assistance with dressing

Question: Who helps?	
Response options	• No one • Informal carer(s) • Aged care service provider(s) • Completely unable
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Question: Who helps?	
Response guidance	Context: • An assessor should determine if the client requires any assistance with getting dressed into clothes. Consider and record: • If the client is currently receiving any assistance to get dressed. Prompts and/or observations: • Does someone help you dress? • Do any family, friends or service providers help you dress?

If need for dressing is being met

Question: Is the need being met?	
Response options	• Completely unmet • Partially met • Completely met • Client does not require assistance
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • An assessor should identify if the client feels their needs are being met. Consider and record: • When responding to this question, consider the client's perception first. If necessary, investigate other considerations (for example, assessor and/or support person observations) if there appears to be a conflict between the client's perception of their needs and their actual needs. • Use the below definitions to assist with the response. ○ **Completely unmet:** the client's needs are not being met.

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Question: Is the need being met?	
	○ **Partially met:** some of the client's needs are being met and/or the client's needs are only being met some of the time. ○ **Completely met:** the client's needs are sufficiently being met. ○ **Completely unable:** the client does not require any assistance to meet their needs. Prompts and/or observations: • Do you have any challenges with dressing yourself? • Have there been any occasions where you were unable to dress yourself? • Do you often find it challenging to dress yourself? • Are you able to comfortably dress yourself whenever required?

Additional details on dressing

Question: Any additional details?	
Response options	• Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • Any additional details identified when discussing the client's ability to get dressed. Consider and record: • The frequency of any support. • If current arrangements are sustainable. • If there are any safety or hygiene concerns. • Any incidents or issues flagged during the discussion with the client. Prompts and/or observations: • What were some of the challenges you found when trying to dress yourself?

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Question: Any additional details?	
	• What supports do you require to dress? • How often are you unable to dress yourself? • What are some difficulties in dressing or undressing yourself?

Ability to groom

Question: Grooming	
Response options	• Without help • With some help • Completely unable
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Response guidance	<u>Context:</u>
	
	• An assessor should identify if the client is able to groom themselves (i.e. brush hair, wash face, shave, clean and clip nails, clean teeth).
	
	<u>Consider and record:</u>
	
	• Consider cognitive as well as physical reasons for requiring assistance.
	• Use the below definitions to assist with the response.
	  ○ **Without help:** if the client can groom themselves.
	  ○ **Completely unable:** if the client cannot groom themselves.
	  ○ **With some help:** if the client can only do so in some circumstances. These circumstances could include:
	  ▪ If they require assistance from a person (informally or formally)
	  ▪ If they can do some tasks but not others
	  ▪ If they have difficulty doing so to a sufficient standard.
	
	<u>Prompts and/or observations:</u>

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Question: Grooming	
	• Do you groom yourself daily? (Do you wash your face daily, do you brush your hair daily, do you clean your teeth daily?) • How do you take care of your personal hygiene? • What do you like to do to take care of your personal hygiene? • Are current arrangements working and sustainable?

Assistance with grooming

Question: Who helps?	
Response options	• No one • Informal carer(s) • Aged care service provider(s) • Other
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	<u>Context:</u> • An assessor should identify if the client is supported with their grooming. <u>Consider and record:</u> • If the client is receiving any assistance with their grooming. <u>Prompts and/or observations:</u> • Does someone help you groom yourself? • Does a family member, friend or service provider help you to groom yourself? • Does someone help you brush your hair/wash your face/brush your teeth? • Does a family member, friend or service provider help you brush your hair/wash your face/brush your teeth?

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If need for grooming is being met

Question: Is the need being met?	
Response options	• Completely unmet • Partially met • Completely met • Client does not require assistance
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Response guidance	Context:
	
	• An assessor should determine if the client feels their grooming needs are being met.
	
	Consider and record:
	
	• When responding to this question, consider the client's perception first. If necessary, investigate other considerations (for example, assessor and/or support person observations) if there appears to be a conflict between the client's perception of their needs and their actual needs.
	• Use the below definitions to assist with the response.
	  ○ **Completely unmet:** the client's needs are not being met.
	  ○ **Partially met:** some of the client's needs are being met and/or the client's needs are only being met some of the time.
	  ○ **Completely met:** the client's needs are sufficiently being met.
	  ○ **Client does not require assistance:** the client does not require any assistance to meet their needs.
	
	Prompts and/or observations:
	
	• Are you able to comfortably groom yourself whenever required?
	• How frequently have you been unable to groom yourself whenever required?
	• Have you felt that you were unable to groom yourself whenever required?
	• Do you often find it difficult to groom yourself?

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Additional details on grooming

Question: Any additional details?	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • Any additional details identified when discussing the client's ability to groom. Consider and record: • What the client can and cannot do. • The frequency of any support. • If current arrangements are sustainable. • If there are any safety or hygiene concerns. • Any incidents or issues flagged during the discussion with the client. Prompts and/or observations: • What are some of the challenges you have with grooming yourself? • What supports do you require with grooming yourself? • What are some of the difficulties you have with grooming yourself?

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Ability to eat

Question: Eating	
Response options	• Without help • With some help • Completely unable
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Question: Eating	

Response guidance	<u>Context:</u>
	
	• An assessor should determine the client's ability to feed themselves, not issues with swallowing.
	
	<u>Consider and record:</u>
	
	• Consider cognitive as well as physical reasons for requiring assistance.
	• Use the below definitions to assist with the response.
	  ○ **Without help:** the client is able to feed themselves without assistance once the food provided is within reach including with the assistance of equipment such as built-up cutlery.
	  ○ **Completely unable:** the client is completely unable to eat without help. This includes clients who are fed via a Percutaneous Endoscopic Gastrostomy feeding tube or a naso-gastric feed.
	  ○ **With some help:** the client is able to eat with some assistance. A client with dementia may be physically able to eat, but may require prompting to eat. A client may have difficulty with dexterity and is unable to cut up their food or may lack the upper limb strength/range of motion to feed themselves. They may also need 'set-up' assistance, (e.g. clients with a visual impairment).
	
	<u>Prompts and/or observations:</u>
	
	• Are you able to feed yourself if food is provided within reach?
	• Do you require set-up assistance with your meals?
	• Do you have difficulty cutting up food due to difficulty with hand dexterity?
	• Do you lack upper limb strength and range of movement to feed yourself?
	• Do you use any adaptive equipment such as built up cutlery to help you feed yourself?
	• Take note of whether the client has limited hand or upper limb strength and range of movement; or whether adaptive equipment is in place or present at the dining table or kitchen.
	• Are current arrangements working and sustainable?

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Assistance with eating

Question: Who helps?	
Response options	• No one • Informal carer(s) • Aged care service provider(s) • Other
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • An assessor should identify if the client is supported with eating. Consider and record: • If the client is receiving any assistance with eating. Prompts and/or observations: • Does someone help you set up your meals? • Does someone feed you your meals? • Does a family member, friend or service provider help you set up your meals? • Does a family member, friend or service provider help feed you meals?

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If need for eating is being met

Question: Is the need being met?	
Response options	• Completely unmet • Partially met • Completely met • Client does not require assistance
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context:

Question: Is the need being met?	

	• If the client feels their needs for eating are being met.
	
	<u>Consider and record:</u>
	
	• When responding to this question, consider the client's perception first. If necessary, investigate other considerations (for example, assessor and/or support person observations) if there appears to be a conflict between the client's perception of their needs and their actual needs.
	• Use the below definitions to assist with the response.
	  ○ **Completely unmet:** the client's needs are not being met.
	  ○ **Partially met:** some of the client's needs are being met and/or the client's needs are only being met some of the time.
	  ○ **Completely met:** the client's needs are sufficiently being met.
	  ○ **Client does not require assistance:** the client does not require any assistance to meet their needs.
	
	<u>Prompts and/or observations:</u>
	
	• Are you able to comfortably eat whenever required?
	• Are you able to eat when you are hungry?
	• Do you eat all your meals?
	• Do you often find that you are not eating your meals?
	• Do you often find that you are unable to eat when required?

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Additional details on eating

Question: Any additional details?	
Response options	Textbox for written response
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	<u>Context:</u> • Any additional details identified when discussing the client's ability to eat.

Question: Any additional details?	
	Consider and record: • What the client can and cannot eat (that they have raised). • The frequency of any support. • If current arrangements are sustainable. • If there are any safety concerns. • Any incidents or issues flagged during the discussion with the client. Prompts and/or observations: • What are some challenges you have with eating? • What are some difficulties you have with eating? • What are some supports you require to help with eating?

Transfers

Question: Transfers	
Response options	• Without help • With some help • Completely unable
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • Response will pre-populate from triage (able to transfer question)
Response guidance	Context: • An assessor should identify if a client is physically able to move from place to place, which includes with all types of transfers. Consider and record: • The response will pre-populate from triage, and the assessor may need to validate that this information is still correct. • Be mindful of asking the client to repeat their story again. It may be more appropriate to frame questions in a way

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Question: Transfers	

	that ask the client to expand on what they shared last time.
	• Whether a client is physically able to move from place to place and includes difficulties with all types of transfers. For example, is the client able to:
	  ○ Maintain or change body position;
	  ○ Carry, move and manipulate objects; and/or
	  ○ Get in or out of bed or a chair (including wheelchairs), in/out of a car?
	• Use the below definitions to assist with the response.
	  ○ **Without help:** the client is able to transfer safely without help from a person or aid.
	  ○ **Completely unable:** the client is completely unable to transfer themselves and/or has no sitting balance. The client is reliant on others or the use of a hoist/pat slide to transfer.
	  ○ **With some help:** the client requires assistance with transfers. This includes:
	  ▪ Requires verbal or physical prompting from a person to transfer;
	  ▪ Requires assistance from one or two people to transfer; and/or
	  ▪ May use an aid such as a toilet raise; bed stick; chair platform or the use of a hoist, standing and raising aids, handi-lift/walk belt.
	
	<u>Prompts and/or observations:</u>
	
	• Do you have difficulty stepping over the bath or getting into the shower?
	• Do you have difficulty getting on/off the toilet? Is the toilet a good height for you?
	• Do you have difficulty getting on/off your bed? Is the bed a good height for you?
	• Do you have difficulty getting on/off your favourite chair? Is it a good height for you? Would you consider using a different chair?
	• Take note of how the client gets on/off their chairs, toilet, bed and any other seating that the client uses (for example shower chair/bath board, grab rails if present). Do they experience pain or difficulty when they sit/stand? Do they use the equipment or grab rail if it is present? If not, why not (for example, maybe the equipment or grab rail was

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Question: Transfers	
	installed for their spouse or a previous occupant and does not suit this person)? Observe the condition of the equipment, for example a rusty shower chair or a broken raised toilet seat. Is the equipment suitable and safe for the person to use? • Are current arrangements working and sustainable?

Assistance with transfers

Question: Who helps?	
Response options	• No one • Informal carer(s) • Aged care service provider(s) • Other
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	<u>Context:</u> • An assessor should identify if the client is supported with transfers. <u>Consider and record:</u> • If the client is receiving any assistance with transfers. <u>Prompts and/or observations:</u> • Do you have someone who helps you with stepping over the bath or getting into the shower? • Do you have someone who helps you with getting on/off the toilet? • Do you have someone who helps you with getting on/off your bed? • Do you have helps you with getting on/off your favourite chair?

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If need for transfers is being met

Question: Is the need being met?	
Response options	• Completely unmet • Partially met • Completely met • Client does not require assistance
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Response guidance	Context:
	
	• An assessor should identify if the client feels their needs with transfers are being met.
	
	Consider and record:
	
	• When responding to this question, consider the client's perception first. If necessary, investigate other considerations (for example, assessor and/or support person observations) if there appears to be a conflict between the client's perception of their needs and their actual needs.
	• Use the below definitions to assist with the response.
	  ○ **Completely unmet:** the client's needs are not being met.
	  ○ **Partially met:** some of the client's needs are being met and/or the client's needs are only being met some of the time.
	  ○ **Completely met:** the client's needs are sufficiently being met.
	  ○ **Client does not require assistance:** the client does not require any assistance to meet their needs.
	
	Prompts and/or observations:
	
	• Are you comfortable with transfers to and from the shower, toilet, bed, or chairs at home?
	• Do you often find that you are unable to transfer to and from the shower, toilet, bed, or chairs at home?

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Additional details on transfers

Question: Any additional details?	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • Any additional details identified when discussing the client's ability to undertake transfers. Consider and record: • Circumstances when they require support with transfers. • The frequency of any support. • If current arrangements are sustainable. • If there are any safety concerns. • Any incidents or issues flagged during the discussion with the client. Prompts and/or observations: • What are some of the challenges you have with transfers to and from the shower, toilet, bed, or chairs at home? • What are some of the supports you require with transfer to and from the shower, toilet, bed, or chairs at home?

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Upper body strength

Question: Upper body strength	
Response options	• Without help • With some help • Completely unable
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context:

Question: Upper body strength	

	• An assessor should identify whether the client has sufficient upper body strength to complete typical day-to-day tasks.
	• Upper body strength is this context could be considered as the client's ability to lift and carry items weighing 5kg, and moving them around your house.
	
	<u>Consider and record:</u>
	
	• Consider cognitive as well as physical reasons for requiring assistance.
	• Use the below definitions to assist with the response.
	  ○ **Without help:** if the client has sufficient upper body strength based on discussing a few examples.
	  ○ **Completely unable:** if the client does not have sufficient upper body strength based on discussing a few examples.
	  ○ **With some help:** if the client only has sufficient upper body strength in some circumstances (time of day, how they are feeling etc.)
	
	<u>Prompts and/or observations:</u>
	
	• Do you have any challenges with your upper body strength?
	• Do you have difficulties performing tasks that require upper body strength?
	• Do you lack upper body strength to perform day to day tasks?
	• Are current arrangements working and sustainable?

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Assistance with tasks requiring upper body strength

Question: Who helps?	
Response options	• No one • Informal carer(s) • Aged care service provider(s) • Other
Question rules	**Base question** that is mandatory to complete

Question: Who helps?	
Pre-populated information	No
Response guidance	Context: • An assessor should identify if the client is supported with tasks requiring upper body strength. Consider and record: • If the client is receiving any assistance with tasks requiring upper body strength. Prompts and/or observations: • Does someone help you with tasks that require upper body strength? (e.g.) • Does a family member, friend or service provide assist with day-to-day tasks that require upper body strength? (e.g.)

If need relating to upper body strength is being met

Question: Is the need being met?	
Response options	• Completely unmet • Partially met • Completely met • Client does not require assistance
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • If the client feels their needs are being met. Consider and record: • When responding to this question, consider the client's perception first. If necessary, investigate other considerations (for example, assessor and/or support person observations) if there appears to be a conflict

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Question: Is the need being met?	

	between the client's perception of their needs and their actual needs.
	• Use the below definitions to assist with the response.
	  ○ **Completely unmet:** the client's needs are not being met.
	  ○ **Partially met:** some of the client's needs are being met and/or the client's needs are only being met some of the time.
	  ○ **Completely met:** the client's needs are sufficiently being met.
	  ○ **Client does not require assistance:** the client does not require any assistance to meet their needs.
	
	<u>Prompts and/or observations:</u>
	
	• Do you find that you are unable to complete day-to-day tasks that require upper body strength? How often?
	• Do you often find that you require assistance when completing day-to-day tasks requiring upper body strength? How often?
	• Are you comfortable with completing day-to-day tasks that require upper body strength?

Additional details on upper body strength

Question: Any additional details?	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	<u>Context:</u> • Any additional details identified when discussing the client's ability to undertake tasks requiring upper body strength. <u>Consider and record:</u> • What tasks they can and cannot do (that they have shared) • The frequency of any support. • If current arrangements are sustainable.

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Question: Any additional details?	
	• If there are any safety concerns. • Any incidents or issues flagged during the discussion with the client. Prompts and/or observations: • What are some of the challenges you face when completing tasks requiring upper body strength? • What are some supports you require to complete day-to-day tasks requiring upper body strength?

Toliet use

Question: Toilet use	
Response options	• Without help • With some help • Completely unable
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • Response will pre-populate from triage (able to go to the toilet, wipe and re-dress question)

Response guidance	Context:
	
	• An assessor should understand the client's ability to go to the toilet.
	
	Consider and record:
	
	• Consider cognitive as well as physical reasons. A client with dementia may be physically able to toilet, but may require prompting. Any issues with incontinence may also be recorded here.
	• Use the below definitions to assist with the response.
	  ○ **Without help:** the client is independent with all toileting tasks
	  ○ **Completely unable:** the client is completely unable to manage toileting without help.
	  ○ **With some help (minor or major):** the client needs some help with toileting tasks. This includes assistance to:

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Question: Toilet use	
	▪ Move on and off the toilet, un/dressing, wiping ▪ Manage continence aids, if incontinent ▪ Manage catheter or ostomy, if present ▪ Manage personal hygiene needs post toileting. <u>Prompts and/or observations:</u> • Can you wipe yourself effectively after using the toilet? • Do you need assistance to wipe yourself? • If the client has a catheter or ostomy in-situ, do they manage for themselves? • Take note of whether there are stains, for example on the carpets or chairs or odours present in the client's home; observe whether the toilet area is clean and tidy. Can the client explain when and how they use their incontinence aids, catheter or ostomy and the regime for managing these? This includes monitoring and support from a third person such as a nurse. Are there odours throughout the house or on the client that indicate difficulties with toilet use? • Are current arrangements working and sustainable?

Assistance with toilet use

Question: Who helps?	
Response options	• No one • Informal carer(s) • Aged care service provider(s) • Other
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	<u>Context:</u> • The assessor should determine if the client is supported with using the toilet. <u>Consider and record:</u>

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Question: Who helps?	
	• If the client is receiving any assistance with using the toilet. <u>Prompts and/or observations:</u> • Does someone help you when you need to use the toilet? • Does someone help you wipe yourself? • Does a family member, friend or service provide help you when you need to use the toilet?

If need relating to toilet use is being met

Question: Is the need being met?	
Response options	• Completely unmet • Partially met • Completely met • Client does not require assistance
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Response guidance	<u>Context:</u>
	
	• The assessor should identify if the client feels their needs are being met.
	
	<u>Consider and record:</u>
	
	• When responding to this question, consider the client's perception first. If necessary, investigate other considerations (for example, assessor and/or support person observations) if there appears to be a conflict between the client's perception of their needs and their actual needs.
	• Use the below definitions to assist with the response.
	  ○ **Completely unmet:** the client's needs are not being met.
	  ○ **Partially met:** some of the client's needs are being met and/or the client's needs are only being met some of the time.
	  ○ **Completely met:** the client's needs are sufficiently being met.

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Question: Is the need being met?	
	○ **Client does not require assistance:** the client does not require any assistance to meet their needs. Prompts and/or observations: • Do you find that you are unable to use the toilet yourself when required? • How often do you find that you are unable to use the toilet on your own? • Do you find it difficult to wipe on your own? How often?

Additional details on toilet use

Question: Any additional details?	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • Any additional details identified when discussing the client's ability to use a toilet. Consider and record: • What the client can and cannot do. • The frequency of any support. • If current arrangements are sustainable. • If there are any safety or hygiene concerns. • Any incidents or issues flagged during the discussion with the client. Prompts and/or observations: • What are some of the challenges you face when you have to use the toilet on your own? • What supports do you require when using the toilet?

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Toileting – bladder

Question: Toileting bladder	
Response options	• Continent (for over 7 days) • Occasional accident (max. once per 24 hours) • Incontinent, or catheterised and unable to manage
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • The assessor should understand if the client is experiencing any toileting challenges relating to their bladder. Consider and record: • If the client is incontinent, has the occasional accident or is incontinent/catheterised and unable to manage. • Use the definitions included in the response options to determine the best answer. Prompts and/or observations: • It is important to consider the audience when raising this question. For example, this question might be best asked or observed in private when asking a client to show them their bathroom. • How do you manage any toileting hiccups? • Do you find these challenges impact what you decide to do each day? • How often do you experience challenges? • Are current arrangements working and sustainable?

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Urinary incontinence issues

Note: this question is flagged if 'occasional accident' or 'incontinent, or catheterised and unable to manage' is selected for previous question on toileting – bladder.

Question: Is client managing urinary incontinence issue?	
Response options	• Yes • No

Question: Is client managing urinary incontinence issue?	
Question rules	This question is a threshold question. **Threshold questions** are mandatory to complete. If 'no' is selected, continue to the next question checking consent to complete the RUIS. This question will be presented to all assessors.
Pre-populated information	No
Response guidance	<u>Context:</u> • The assessor should consider the response to the previous question to determine if the client is managing any urinary incontinence issues. • Urinary incontinence refers to the involuntary loss of bladder control. The severity can vary, including occasional leakage of urine when coughing or sneezing. It would become an issue at the more severe end when a client often experiences a sudden and strong urge to urinate (urgency) that doesn't allow enough time to reach a toilet. <u>Consider and record:</u> • If the client is managing a urinary incontinence issue. <u>Prompts and/or observations:</u> • Continence is a sensitive topic to discuss. Some clients may be comfortable answering questions about their continence, others may not. • Consider introducing questions using a framing statement such as "These next few questions are about your continence and are a bit personal..." • Observe and assess the home environment. There may be a strong odour. • It is important to consider the audience when raising this question. For example, this question might be best asked or observed in private when asking a client to show them their bathroom. • How do you manage any toileting hiccups? • Do you find these challenges impact what you decide to do each day? • How often do you experience challenges?

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Question: Is client managing urinary incontinence issue?	
	Support resources: • Urinary incontinence | healthdirect • Please review the MAClearning element **Validated Assessment Tools in Practice** for further guidance on how and when to administer the RUIS with a client at an assessment.

Consent to complete Revised Urinary Incontinence Scale

Question: Is the client able/willing to complete the Revised Urinary Incontinence Scale?	
Response options	• Yes • No
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No
Response guidance	Context: • An assessor should use the Revised Urinary Incontinence Scale (RUIS) to assess urinary incontinence and to monitor patient outcomes following treatment, if appropriate. • Continence is a sensitive and private issue. The assessor must use clinical judgement to determine the appropriateness of administering the RUIS with the client at assessment. Consider and record: • The appropriateness of administering the RUIS with the client at assessment. • If the client is able and willing to complete the RUIS at assessment. Prompts and/or observations:

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Question: Is the client able/willing to complete the Revised Urinary Incontinence Scale?	
	• Consider verbal and non-verbal cues that may determine the appropriateness of administering the RUIS with the client at assessment. E.g. if client becomes distressed • Ask the client directly, but sensitively, whether they are willing to complete the RUIS at assessment. • Consider whether the client has cognitive or other issues that may impact their level of insight into their urinary continence issues. • Consider a carer's report if the client is unable to complete the RUIS at assessment.

Validated tool: Revised Urinary Incontinence Scale

Context:

If there are indicators within the assessment that further assessment is required, use the Revised Urinary Incontinence Scale (RUIS) as a follow-up tool.

A National Continence Management Strategy Project Refining Continence Measurement Tools was undertaken to revise and develop some short incontinence assessment tools (5 items). From the analysis of the urinary and faecal incontinence items and scales included in the 2004 South Australian Health Omnibus Survey, this study developed the RUIS and RFIS.

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These scales improved the assessment of incontinence when compared with the original measures.[3]

Instructions and interpretation:

When completing the RUIS, respondents select one particular response option from the set of standard response options for each of the five questions. These response options can then be scored by using the numbers presented in brackets to the right of each response option. The RUIS total score is then calculated by adding up a person's score for each question, resulting in a possible score range of 0-16.[4]

The scale includes both questions from the Incontinence Severity Index (ISI)[5] and therefore an ISI score can also be calculated. This is done by multiplying the scores from questions 4 and 5, resulting in a score range from 0 to 12, where a 0 score represents no incontinence. Scores from 1 to 12 are grouped into the following four severity levels: 1 – 2 = slight, 3 – 6 = moderate, 8 – 9 = severe, 12 = very severe. Finally, users should check that each question has a response option selected in order to avoid any missing data. This is because missing data cannot be adjusted for in short scales like the RUIS.

Additional information and training resources:

Please refer to the below guidance material for information on completing this validated tool and appropriately asking questions.

- Revised Incontinence and Patient Satisfaction Tools Version 2 – Technical Manual and Instructions
- RUIS Brochure – Summary for assessing and monitoring urinary incontinence.
- International Continence Society (ICS)- RUIS - study findings
- Please review the MAClearning element **Validated Assessment Tools in Practice** for further guidance on how and when to administer the RUIS with a client at an assessment.

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Urine leakage related to feeling of urgency

Question: Urine leakage related to the feeling of urgency	
Response options	• Not at all • Slightly • Moderately • Greatly
Question rules	This question will be presented to all assessors.

[3] Sansoni J et al., 2007, 'Refining Continence Measurement Tools', Centre for Health Service Development, University of Wollongong and the Department of Psychiatry, The University of Melbourne.

[4] Sansoni J et al., 2010, 'Selecting Tools for ACAT Assessment: A Report for the Aged Care Assessment Program (ACAP) Expert Clinical Reference Group', Centre for Health Service Development, University of Wollongong, Department of Health and Ageing, Canberra.

[5] Sandvik H et al., 2000, 'A severity index for epidemiological surveys of female urinary incontinence: comparison with 48-hour pad-weighing tests' in *Neurourol Urodyn*,19(2):137-45.

Question: Urine leakage related to the feeling of urgency	
	If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Urine leakage related to physical activity, coughing or sneezing

Question: Urine leakage related to physical activity, coughing or sneezing	
Response options	• Not at all • Slightly • Moderately • Greatly
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

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Amount of urine leakage

Question: Small amounts of urine leakage (drops)	
Response options	• Not at all • Slightly • Moderately • Greatly
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Frequency experiencing urine leakage

Question: How often do you experience urine leakage?	
Response options	• Never

Question: How often do you experience urine leakage?	
	• Less than once a month • A few times a month • A few times a week • Every day and/or night
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Urine leakage amount each time

Question: How much urine do you lose each time?	
Response options	• None • Drops • Small splashes • More
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

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Toileting – bowels

Question: Toileting	Bowels
Response options	• Incontinent (or needs to be given enemata) • Occasional accident (once/week) • Continent
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context:

Question: Toileting	Bowels
	• The assessor should understand if the client is experiencing any toileting challenges relating to their bowels. Consider and record: • If the client is incontinent, has the occasional accident or is incontinent/catheterised and unable to manage. • Use the definitions included in the response options to determine the best answer. Prompts and/or observations: • It is important to consider the audience when raising this question. For example, this question might be best asked or observed in private when asking a client to show them their bathroom. • How do you manage any toileting hiccups? • Do you find these challenges impact what you decide to do each day? • How often do you experience challenges? • Are current arrangements working and sustainable?

Bowel incontinence issues

Note: this question is flagged if 'occasional accident' or 'incontinent, or catheterised and unable to manage' is selected for previous question on toileting – bowel.

Question: Is client managing bowel incontinence issue?	
Response options	• Yes • No
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No
Response guidance	Context: • The assessor should consider the response to the previous question to determine if the client is managing any bowel incontinence issues.

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Question: Is client managing bowel incontinence issue?	
	• Bowel incontinence, also known as faecal incontinence, occurs when you're unable to control your bowel movements. It can range from occasional irregular stool leaks while passing gas to a total loss of control over your bowels. It would become an issue if towards the latter end of this range. <u>Consider and record:</u> • If the client is managing a bowel incontinence issue. <u>Prompts and/or observations:</u> • Continence is a sensitive topic to discuss. Some clients may be comfortable answering questions about their continence, others may not. • Consider introducing questions using a framing statement such as "These next few questions are about your continence and are a bit personal..." • Observe and assess the home environment. There may be a strong odour. • It is important to consider the audience when raising this question. For example, this question might be best asked or observed in private when asking a client to show them their bathroom. • How do you manage any toileting hiccups? • Do you find these challenges impact what you decide to do each day? • How often do you experience challenges? <u>Support resources:</u> • Faecal incontinence | healthdirect

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Consent to complete Revised Faecal Incontinence Scale

Question: Is the client able to complete the Revised Faecal Incontinence Scale?	
Response options	• Yes • No
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.

Question: Is the client able to complete the Revised Faecal Incontinence Scale?	
Pre-populated information	No
Response guidance	Context: • An assessor should use the Revised Faecal Incontinence Scale (RFIS) is used to assess faecal incontinence and to monitor patient outcomes following treatment, if appropriate. • Continence is a sensitive and private issue. The assessor must use clinical judgement to determine the appropriateness of administering the RFIS with the client at assessment. Consider and record: • The appropriateness of administering the RFIS with the clint at assessment. • If the client is able and willing to complete the RFIS at assessment. Prompts and/or observations: • Consider verbal and non-verbal cues that may determine the appropriateness of administering the RFIS with the client at assessment. E.g. if client becomes distressed • Ask the client directly, but sensitively, whether they are willing to complete the RFIS at assessment. • Consider whether the client has cognitive or other issues that may impact their level of insight into their urinary continence issues. • Consider a carer's report if the client is unable to complete the RFIS at assessment.

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Validated tool: Revised Faecal Incontinence Scale

Context:

If there are indicators within the assessment that further assessment is required, use the Revised Faecal Incontinence Scale (RUIS) as a follow-up tool.

A National Continence Management Strategy project Refining Continence Measurement Tools was undertaken to revise and develop some short incontinence assessment tools (5

items). From the analysis of the urinary and faecal incontinence items and scales included in the 2004 South Australian Health Omnibus Survey, this study developed the RUIS and RFIS. These scales improved the assessment of incontinence when compared with the original measures.[6]

Instructions and interpretation:

People respond to the Revised Faecal Incontinence Scale (RFIS) questions by selecting one particular response option from the set of standard response options for each question.

These response options can then be scored by using the numbers presented in brackets to the right of each response option. The RFIS total score is then calculated by adding up a person's score for each question. Adding the score for each of the five questions results in a possible score range of 0 – 20. At this stage, there is no data about grouping people into valid clinical categories representing different severity levels of incontinence (e.g. mild, moderate, or severe); however, further clinical research is being undertaken to provide this information.

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Finally, users should check that each question has a response option selected in order to avoid any missing data. This is because missing data cannot be adjusted for in short scales like the RFIS.[7]

Additional information and training resources:

Please refer to the below guidance material for information on completing this validated tool and appropriately asking questions.

- Revised Incontinence and Patient Satisfaction Tools Version 2 – Technical Manual and Instructions
- RFIS Brochure – Summary of assessing and monitoring faecal incontinence.
- Please review the MAClearning element **Validated Assessment Tools in Practice** for further guidance on how and when to administer the RFIS with a client at an assessment.

Bowel incontinence severity

Question: Client bowel incontinence severity	
Response options	• Occasional • Mild

[6] Sansoni J et al., 2007, 'Refining Continence Measurement Tools', Centre for Health Service Development, University of Wollongong and the Department of Psychiatry, The University of Melbourne.

[7] Sansoni J et al., 2010, 'Selecting Tools for ACAT Assessment: A Report for the Aged Care Assessment Program (ACAP) Expert Clinical Reference Group', Centre for Health Service Development, University of Wollongong, Department of Health and Ageing, Canberra.

Question: Client bowel incontinence severity	
	• Moderate • Severe
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Leaks, accidents or losing control with solid stools

Question: Do you leak, have accidents or lose control with solid stool?	
Response options	• Never • Rarely i.e. less than once in the past four weeks • Sometimes i.e. less than once a week, but once or more in the past four weeks • Often or usually i.e. less than once a day but once a week or more • Always i.e. once or more per day or whenever you have a bowel movement
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

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Leaks, accidents or losing control with liquid stools

Question: Do you leak, have accidents or lose control with liquid stool?	
Response options	• Never • Rarely i.e. less than once in the past four weeks • Sometimes i.e. less than once a week, but once or more in the past four weeks • Often or usually i.e. less than once a day but once a week or more

Question: Do you leak, have accidents or lose control with liquid stool?	
	• Always i.e. once or more per day or whenever you have a bowel movement
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Leaking stool if not getting to toilet in time

Question: Do you leak stool if you don't get to the toilet in time?	
Response options	• Never • Rarely i.e. less than once in the past four weeks • Sometimes i.e. less than once a week, but once or more in the past four weeks • Often or usually i.e. less than once a day but once a week or more • Always i.e. once or more per day or whenever you have a bowel movement
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

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Changing underwear from stool leak

Question: Does stool leak so that you have to change your underwear?	
Response options	• Never • Rarely i.e. less than once in the past four weeks • Sometimes i.e. less than once a week, but once or more in the past four weeks • Often or usually i.e. less than once a day but once a week or more

Question: Does stool leak so that you have to change your underwear?	
	• Always i.e. once or more per day or whenever you have a bowel movement
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Altered lifestyle from bowel or stool leakage

Question: Does bowel or stool leakage cause you to alter your lifestyle?	
Response options	• Never • Rarely i.e. less than once in the past four weeks • Sometimes i.e. less than once a week, but once or more in the past four weeks • Often or usually i.e. less than once a day but once a week or more • Always i.e. once or more per day or whenever you have a bowel movement
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

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Likely to recommend residential respite care

Question: Are you likely to recommend residential respite care?	
Response option	• Yes • No
Question rules	**Additional question** that will be presented to a clinical assessor during a comprehensive assessment. It is mandatory for a clinical assessor to complete this question if prompted.

Question: Are you likely to recommend residential respite care?	
Pre-populated information	No
Response guidance	Context: • The assessor should indicate if they are likely to recommend residential respite care. Consider and record: • If the assessor is likely to recommend residential respite care in the client's support plan. Prompts and/or observations: • This does not require any prompts for the client, and is instead based observations from how the assessment has progressed so far. Support resources: • Managing residential respite care | Australian Government Department of Health and Aged Care

Completion of De Morton Mobility Index modified

Note: Only clinical assessors who have completed the Department's training on DEMMI modified are able to use this validated tool. Select 'no' if this training has not been completed.

Question: De Morton Mobility Index	
Response option	• Yes • No
Question rules	**Base question** that is mandatory to complete for a clinical assessor only.
Pre-populated information	No
Response guidance	Context:

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Question: De Morton Mobility Index	
	• Note: clinical assessors are required to complete the Department's training on DEMMI modified before using this validated tool. • Select 'no' if the assessor has not completed training on DEMMI modified or if the assessor is undertaking a home support assessment. • This validated tool must be administered in-person with the client. Consider and record: • If the assessor has completed the Department's training on DEMMI modified, and is wanting to complete a DEMMI modified on the client. Prompts and/or observations: • Client consent considerations.

Summary of function notes

Function assessor notes	
Response option	Text box for written response
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • Response will pre-populate from triage (summary of function notes question) • Response will pre-populate in the client's support plan (assessment summary)

Response guidance	Context:
	
	• This is to provide a holistic summary of the client's level of functioning and how this impacts on activities of daily living. This could include:
	  ○ The client's level of function.
	  ○ How the client is managing their needs at present.
	  ○ The impact of current function on activities of daily living.
	  ○ Any unmet needs.

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Function assessor notes	
	○ The services and supports required for the client to remain living independently. Consider and record: • The activities the client can do, what activities they receive support with, and whether this support is formal or informal. • The activities the client requires assistance with, in order to fulfil the need. • Any comments about the extent to which informal support currently being received is working and sustainable. • Some information from triage will automatically display in this text box. It is appropriate to edit this information with new details about the assessment if required, as this will still display in the triage section.

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DEMMI modified section

This section will only display to clinical assessors during a comprehensive assessment if it has been indicated in the function section that residential respite care is likely to be recommended and the De Morton Mobility Index modified (DEMMI modified) has been selected to be undertaken.

Validated tool: De Morton Mobility Index modified

Context:

The **DEMMI modified** measures the mobility of older people across clinical settings and rates what the person is capable of doing (Can Do), rather than what they currently do.

Instructions and interpretation:

Assessors should use their judgement on how to ask questions and requests related to this validated tool. Assessors will need to consider the circumstances and background of clients when following the validated tool questions, and ensure they are:

> Being mindful of appropriate and understandable language;
> adapting questions to the context that is appropriate; and
> Making alternative prompts or suggestions where needed.

In regard to capability, please take account of physical function, cognition and behaviour, motivation, and organisational ability. If differences in function occur in different environments or times of the day (i.e. day/night), please record the lower score.

It is preferable to base this tool on direct observation, unless there is a falls risk or it causes the resident distress. Please rate with current aids and appliances in place.

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Scoring definitions:

- Minimal assistance – “hands-on” physical but minimal assistance, primarily to guide movement;
- Supervision – another person monitors the activity without providing hands-on assistance. May include verbal prompting; and
- Independent – the presence of another person is not considered necessary for safe mobility.

Additional information and training resources:

Please refer to the below guidance material for information on completing this validated tool and appropriately asking questions.

- The completion of Departmental training on the DEMMI modified is required before it can be used in a client assessment.
- AN-ACC Assessor Manual for guidance on responding to questions in the DEMMI-modified validated tool.

Bridge

Question: Bridge	
Response option	• Unable • Able
Question rules	**Additional question** that will be presented to a clinical assessor only. It is mandatory for a clinical assessor complete this question if prompted.
Pre-populated information	No

Roll onto side

Question: Roll onto side	
Response option	• Unable • Able
Question rules	**Additional question** that will be presented to a clinical assessor only. It is mandatory for a clinical assessor complete this question if prompted.
Pre-populated information	No

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Lying to sitting

Question: Lying to sitting	
Response option	• Unable • Minimal assistance • Supervision • Independent
Question rules	**Additional question** that will be presented to a clinical assessor only. It is mandatory for a clinical assessor complete this question if prompted.
Pre-populated information	No

Sit unsupported in chair

Question: Sit unsupported in chair	
Response option	• Unable • 10 seconds
Question rules	**Additional question** that will be presented to a clinical assessor only. It is mandatory for a clinical assessor complete this question if prompted.
Pre-populated information	No

Sit to stand from chair

Question: Sit to stand from chair	
Response option	• Unable • Minimal assistance • Supervision • Independent
Question rules	**Additional question** that will be presented to a clinical assessor only. It is mandatory for a clinical assessor complete this question if prompted.
Pre-populated information	No

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Sit to stand without using arms

Question: Sit to stand without using arms	
Response option	• Unable • Able
Question rules	**Additional question** that will be presented to a clinical assessor only. It is mandatory for a clinical assessor complete this question if prompted.
Pre-populated information	No

Stand unsupported

Question: Stand unsupported	
Response option	• Unable • 10 seconds

Question: Stand unsupported	
Question rules	**Additional question** that will be presented to a clinical assessor only. It is mandatory for a clinical assessor complete this question if prompted.
Pre-populated information	No

Stand feet together

Question: Stand feet together	
Response option	• Unable • 10 seconds
Question rules	**Additional question** that will be presented to a clinical assessor only. It is mandatory for a clinical assessor complete this question if prompted.
Pre-populated information	No

Stand on toes

Question: Stand on toes	
Response option	• Unable • 10 seconds
Question rules	**Additional question** that will be presented to a clinical assessor only. It is mandatory for a clinical assessor complete this question if prompted.
Pre-populated information	No

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Tandem stand with eyes closed

Question: Tandem stand with eyes closed	
Response option	• Unable • 10 seconds
Question rules	**Additional question** that will be presented to a clinical assessor only. It is mandatory for a clinical assessor complete this question if prompted.
Pre-populated information	No

Waking distance +/- gait aid

Question: Walking distance +/ gait aid	
Response option	• Unable • 5 metres • 10 metres • 20 metres • 50 metres
Question rules	**Additional question** that will be presented to a clinical assessor only. It is mandatory for a clinical assessor complete this question if prompted.
Pre-populated information	No

Walking independence

Question: Walking independence	
Response option	• Unable • Minimal assistance • Supervision • Independent with gait aid • Independent without gait aid
Question rules	**Additional question** that will be presented to a clinical assessor only. It is mandatory for a clinical assessor complete this question if prompted.
Pre-populated information	No

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Physical, personal health and frailty section

The purpose of the physical, personal health and frailty section of the IAT is to understand aspects of the client's:

- Physical health covering any sensory, vision, hearing or speech concerns, or challenges relating to the somatosensory system;
- Personal health covering oral health, swallowing, skin conditions, pain, sleep, alcohol use, tobacco use, and illicit drug use and/or prescription medication for non-medical reasons;

This section is also to assess the client's frailty. Frailty is a syndrome of physiological decline that occurs in later life and is associated with vulnerability to adverse health outcomes.

Physical health

Sensory concerns

Question: Sensory concerns	
Response options	• Yes (provide details in follow up questions) • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • The assessor should identify if the client has any sensory concerns. • Sensory concerns refer to symptoms and related behaviours that occur when someone has difficulty processing information from their senses and responding appropriately to it. These sensory issues can involve various senses, including sight, hearing, touch, smell, and taste. • Note: for the purpose of the IAT, a client with any vision limitation addressed by glasses does not have a vision concern. • Note: for the purpose of the IAT, a client with any hearing limitation addressed by hearing aids or similar does not have a hearing concern. Consider and record:

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Question: Sensory concerns	
	• Whether the client has indicated if they experience any sensory concerns. • If the client is experiencing multiple sensory concerns, multiple responses to follow up questions on different types of sensory concerns may be appropriate. • The yes and other response options will prompt follow up questions for more details. • If the answer is no but there is additional information to provide, consider selecting 'other' instead. For example, this could include previous sensory concerns that are now resolved. <u>Prompts and/or observations:</u> • Do you currently have any concerns or difficulties with your vision, hearing or speech? • Have you ever had any concerns or difficulties with your vision, hearing or speech?

Vision concerns

Question: Vision concerns	
Response options	• Low vision • Monocular blindness • Binocular blindness
Question rules	**Base question**
Pre-populated information	No
Response guidance	<u>Context:</u> • The assessor should identify the type of vision concern being experienced by the client. • Note: for the purpose of the IAT, a client with any vision limitation addressed by glasses <u>does not</u> have a vision concern. <u>Consider and record:</u> • If the client experiences low vision, monocular blindness or binocular blindness. • Use the below definitions to assist with the response.

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Question: Vision concerns	
	○ **Low vision:** refers to a significant visual impairment that cannot be fully corrected with glasses, contact lenses, medication, or eye surgery. ○ **Monocular blindness:** also known as amaurosis fugax, refers to a sudden and temporary loss of vision in one eye. ○ **Binocular blindness:** also known as Binocular vision dysfunction (BVD), refers to a group of conditions that affect how your eyes and brain work together to perceive the world. Instead of seeing a seamless single image, individuals with BVD experience visual challenges due to misalignment or other issues. • Record whether the client has any aids that assist them including the presence of an assistance dog, and/or whether the client would benefit from assistance of aids. • Assessors must consider and document the following: 1. Does the client have an assistance dog? 2. If yes, assessors are to further ask the client: are you eligible for the Federal Government funded Physical Assistance Dogs Program ? 3. If no to question two, then assessors are to further consider: does your assistance dog meet the definition of an assistance dog used by HealthDirect? (if yes to question 2 then the individual is not eligible for assistance dog funding under the Support at Home program. Where eligible and able, they should seek funding from the Physical Assistance Dogs program 4. If yes to question three, then the assessor will allocate a specified need AT tier. If no to question 3 then the individual is not eligible for assistance dog funding under the Support at Home program and where eligible and able should seek funding from the Physical assistance dogs program. Prompts and/or observations: • Do you have any vision concerns? • Do you have any existing visual impairments? • Do you require glasses for your sight? Is it required for both eyes? Support resources:

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Question: Vision concerns	
	• Blindness | healthdirect

Hearing concerns

Question: Hearing concerns	
Response options	• Poor hearing • Deafness
Question rules	**Base question**
Pre-populated information	No

Response guidance	Context:
	• The assessor should identify the type of hearing concern being experienced by the client.
	• Note: for the purpose of the IAT, a client with any hearing limitation addressed by hearing aids or similar does not have a hearing concern.
	Consider and record:
	• If the client experiences poor hearing or deafness.
	• Use the below definitions to assist with the response.
	  ○ **Poor hearing:** also known as hearing loss, poor hearing is the difficulty to hear speech and other sounds.
	  ○ **Deafness:** the complete loss of hearing.
	Prompts and/or observations:
	• Do you sometimes find it difficult to hear the conversation in a busy room?
	• What about your hearing in other situations?
	• When do you hear well? When do you hear not so well?
	Support resources:
	• Hearing loss - prevention, signs, diagnosis and treatment | healthdirect
	• Deafness | healthdirect

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Speech concerns

Question: Speech concerns	
Response options	• Yes • No
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • The assessor should identify if the client has any speech concerns. • Speech concerns are sometimes known as speech disorders. Speech concerns affect a person's ability to produce sounds that create words. Consider and record: • Some common types of speech concerns include: ○ **Stuttering**: interrupts the flow of speech. People who stutter can experience disruptions such as repetitions (involuntarily repeating sounds, vowels, or words), blocks (difficulty making the necessary speech sounds), and prolongations (stretching or drawing out of particular sounds or words) ○ **Apraxia of Speech**: a motor speech disorder where the person has difficulty moving the muscles needed to form words. The brain struggles to coordinate the muscle movements necessary for speech. ○ **Dysarthria**: occurs when the muscles used to speak are weakened or paralysed, causing slurred or slow speech that can be difficult to understand. Prompts and/or observations: • Do you have any concerns with your speech? • Do you have any speech difficulties? Support resources: • Speech problems | healthdirect

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Somato sensory system challenges

Note: the somatosensory system is a network of structures in the brain and body that influence the perception of touch, temperature, body position, and pain.

Question: Somato Sensory (relating to sensation anywhere in the body)	
Response options	• Pressure • Pain • Warmth
Question rules	**Base question**
Pre-populated information	No

Response guidance	Context:
	
	• The assessor should identify if the client has any somatosensory concerns relating to sensations in the body.
	• The somatosensory system is a network of structures in the brain and body that influence the perception of touch, temperature, body position, and pain.
	
	Consider and record:
	
	• If the client is experiencing any somatosensory concerns relating to pressure, pain and warmth.
	• Use the below definitions to assist with the response.
	  ○ **Pressure:** the client sensing pressure against the skin. Pressure occurs when there is a displacement to the skin and underlying tissue.
	  ○ **Pain:** the client is experiencing feelings of pain. Pain is the brain sending a signal that something is wrong with the body.
	  ○ **Warmth:** the client is experiencing a feeling of an increase in body temperature. Warmth in this context is the brain sending a signal that something is potentially dangerous.
	
	Prompts and/or observations:
	
	• Do you have any concerns with pressure, pain, or warmth anywhere on your body?
	• Do you feel a sensation of pressure in your body at times?

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Question: Somato Sensory (relating to sensation anywhere in the body)	
	• Do you feel a sensation of pain in your body at times? • Do you sometimes feel a sensation of being warm in your body at times? (for reasons other than your environment)

Sensory concerns details

Question: Details	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No

Response guidance	<u>Context:</u>
	• This is to provide a holistic summary of the client's sensory concerns.
	
	<u>Consider and record:</u>
	• Additional details on all sensory concerns raised by the client. This could include:
	  ○ A summary of all sensory concerns raised and impacts experienced by the client.
	  ○ The length of time that the client has been experiencing the sensory concern, and any changes in the severity of its impact.
	  ○ How the sensory concerns currently impact the client's day-to-day activities.
	• If the client is seeing or has seen any health professional about any sensory concerns.
	<u>Prompts and/or observations:</u>
	• Can you please share some more details about some of the concerns you have raised?
	• How long have you been experiencing the concern?
	• Have you been to see a health professional about your concern?
	• How does the concern impact you day-to-day?
	• Is there anything else you do to manage the concern?

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Personal health

Oral health

Question: Any oral health concerns? (e.g. problems with teeth, mouth and/or dentures)	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Response guidance	Context:
	
	• The assessor should identify whether the client has any oral health concerns.
	• Oral health concerns include problems with teeth, mouth or dentures.
	• A good standard of oral health enables an individual to eat, speak and socialise without active diseases, discomfort or embarrassment.
	• Problems associated with poor oral health include impaired nutrition, systemic morbidity, speech problems and decreased personal satisfaction, resulting in an impaired quality of life.
	• Many oral problems can be either prevented or effectively treated.
	
	Consider and record:
	
	• Indicate 'yes' if the client has oral health concerns such as:
	  ○ Teeth, mouth or swallowing problems that make it hard to eat;
	  ○ Loose fitting dentures or loose teeth; and/or
	  ○ Gum disease or painful gums.
	
	Prompts and/or observations:
	
	• Do you have your own teeth/partial denture or full dentures?
	• When do you clean your teeth/dentures?
	• Do you experience any pain when cleaning your teeth?
	• Do your gums bleed when you brush your teeth or gums?
	• Do you regularly clean your gums and if yes how?

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Question: Any oral health concerns? (e.g. problems with teeth, mouth and/or dentures)	
	Recommendations: • Recommendation/referral to a dentist, dental practitioner and/or dietitian, if appropriate.

Swallowing

Question: Do you have any problems with swallowing causing difficulties when you eat or drink?	
Response options	• No • Yes always (provide details text box) • Yes sometimes (provide details text box) • Yes rarely (provide details text box)
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • The assessor should determine if a client has problems with swallowing. • Swallowing, involves nerves, muscles of the mouth, throat and the oesophagus. A client who has swallowing difficulties could be at risk of choking, malnutrition or dehydration. • Poor oral hygiene, severe illness, disabilities, Parkinson's disease and/or dementia can significantly increase the client's risk of swallowing deficits.[8] • The yes and other response options will prompt follow up questions for more details. • If the answer is no but there is additional information to provide, consider selecting 'other' instead. For example, this could include previous swallowing concerns that are now resolved but still worthwhile flagging. Consider and record: • Consider if the client has:

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[8] Australian and New Zealand Society for Geriatric Medicine, 2011, 'Position statement: dysphagia and aspiration in older people', *Australasian Journal on Ageing*, vol. 30, no. 2, pp. 98-103.

Question: Do you have any problems with swallowing causing difficulties when you eat or drink?	
	○ Problems swallowing food or fluid, for example tea, coffee, water. ○ Issues with food getting stuck in their throat after chewing and swallowing. ○ Modified texture food (either prescribed or self-modified). ○ Difficulty swallowing saliva. ○ A sore throat constantly. ○ Discussed any issues with their GP or a health professional. • Use the below definitions to assist with the response. ○ **No**: the client does not experience any swallowing concerns. ○ **Yes always (provide details text box)**: the client experiences swallowing concerns in all circumstances. ○ **Yes sometimes (provide details text box):** the client experiences swallowing concerns in some circumstances. ○ **Yes rarely (provide details text box)**: the client experiences swallowing concerns for time-to-time. ○ **Other (provide details text box):** if the client has previously experienced swallowing difficulties but does not currently, or if there is anything else the client has flagged that is relevant to the assessment. <u>Prompts and/or observations:</u> • Do you have any problems swallowing your food or fluid, for example tea, coffee, water? • Does food get stuck in your throat after chewing and swallowing? • Do you have difficulty swallowing saliva? • Do you constantly have a sore throat? • Have you noticed more coughing or spluttering when eating or drinking? • Do you have a previous diagnosis of dysphagia? <u>Recommendations:</u> • Recommendation/referral to GP.

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Foot problems

Question: Any foot problems that affect your ability to walk or move about?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • The assessor should identify if the client is experiencing any foot problems that affect their ability to walk or move around. Consider and record: • If the client is experiencing any foot problems that prevents their ability to walk or move around. Prompts and/or observations: • Do you have any foot problems that impact your ability to walk or move around?

Details of foot problems

Question: Foot problems	
Response options	• Painful feet inclusion painful corns, arthritis • Bunions • Gout • Swollen ankles/feet • Toe deformities (hammer, mallet, and claw toes) • Fallen arches • Other
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context:

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Question: Foot problems	
	• The assessor should identify the cause of foot problems affecting the client's ability to walk or move around. Consider and record: • Multiple response options may be selected if the client is experiencing more than one foot problem affecting their ability to walk or move around. • Use the below definitions to assist with the response. ○ **Painful feet inclusion painful corns, arthritis:** any unpleasant sensory feeling experienced in the foot. ○ **Bunions:** also known as hallux valgus, a deformity of the joint connecting the big toe to the foot. ○ **Gout:** a type of arthritis characterized by painful inflammation in a joint. It typically occurs due to a buildup of uric acid crystals. While the big toe is most commonly affected, gout can also impact other joints such as ankles. ○ **Swollen ankles/feet:** also known as edema, can be quite uncomfortable and may occur for various reasons. ○ **Toe deformities (hammer, mallet, and claw toes):** refer to abnormal positioning or misalignment of the bones in the toes. ○ **Fallen arches:** also known as **flat feet**, occur when the normal foot arches have partially or completely collapsed. In this condition, the inner or middle side of the foot comes down to the floor rather than remaining raised. This can cause the whole foot to roll inwards, a phenomenon known as over-pronation. ○ **Other:** any other foot problem not covered by the above response options. <u>Prompts and/or observations:</u> • What are difficulties that impact your ability to walk or move around? • Can you please describe the foot problem that impacts your ability to walk or move about? • Have you been to see a health professional about your foot problem? Did they give you a diagnosis?

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Major skin conditions

Question: Any major skin conditions?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • The assessor should determine if the client has any major skin conditions. • Skin is a person's protective layer. During the ageing process the skin thins and loses elasticity and moisture and is more easily susceptible to injury such as tears, ulcers and dryness. • Nutrition, mobility, cognition, falls, pain management and continence are vital to healthy skin integrity. Consider and record: • If the client has major skin conditions that are a concern. • A major skin condition could be a skin condition with moderate to significant symptoms. • A response will request the assessor to provide more details. Prompts and/or observations: • Clients may not consider skin conditions as potential issues. Therefore, observation at assessment is important. • Colour changes in the client's skin – skin over bony areas (lower back, hips, heels, elbows, etc.) may appear reddened and may or may not blanch white when pressed. Skin may also appear bruised, having a blue, purple or black colour. • Swelling of the feet, ankles and lower limbs. • Temperature changes – compared to skin surrounding the affected area, the beginning stage of a pressure ulcer may feel warm to the touch or cool. • Changes in consistency of skin – the beginning stage of a pressure ulcer may make the affected skin feel firm to the

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Question: Any major skin conditions?	
	touch or may make it feel boggy. Boggy skin can best be described as feeling as though it's filled with fluid. • Changes in sensation – the person may start complaining about pain, tingling, or itching in affected areas. • If a client has a dressing in place, ask why they have the dressing on; did they knock themselves; did they have a fall where they sustained the wound? Some dressings may not be visible. Support resources: • Skin conditions | healthdirect

Major skin conditions details

Question: Select all that apply	
Response options	• Pressure ulcer • Other skin ulcer • Healing surgical wounds • Other skin tears, cuts and lesions • Other skin problems (e.g. bruising, rashes, itching, eczema etc) • Other, please specify
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • The assessor should identify the types of major skin condition/s that the client is experiencing. Consider and record: • Multiple response options may be selected if the client is experiencing more than one major skin condition. • Use the below definitions to assist with the response. ○ **Pressure ulcer:** Signs that a pressure ulcer is beginning to form may include colour changes, temperature changes, changes in consistency of skin or changes in sensation.

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	○ **Other skin ulcer:** Signs of other skin ulcers include open craters, often round, red, swollen and tender to touch. These can appear anywhere on the body and can be caused by a number of factors including circulatory impairment. ○ **Healing surgical wounds:** Signs of surgical wounds include the presence of dressings and stitches. The assessor should ask the client if they are being medically treated. ○ **Other skin tears, cuts or lesions:** Signs of unusual skin tears, cuts or lesions. The assessor should ask the client if they are being medically treated. ○ **Other skin problems (e.g. bruises, rashes, itching, eczema):** Signs can also include dry skin which can be an indicator of dehydration and a change in skin colour i.e. yellow signifies possible liver problems. ○ **Other, please specify:** any other major skin condition not covered in the response options listed above. <u>Prompts and/or observations:</u> • Clients may not consider skin conditions as potential issues. Therefore, observation at assessment is important. • Colour changes in the client's skin – skin over bony areas (lower back, hips, heels, elbows, etc.) may appear reddened and may or may not blanch white when pressed. Skin may also appear bruised, having a blue, purple or black colour. • Temperature changes – compared to skin surrounding the affected area, the beginning stage of a pressure ulcer may feel warm to the touch or cool. • Changes in consistency of skin – the beginning stage of a pressure ulcer may make the affected skin feel firm to the touch or may make it feel boggy. Boggy skin can best be described as feeling as though it's filled with fluid. • Changes in sensation – the person may start complaining about pain, tingling, or itching in affected areas. • If a client has a dressing in place, ask why they have the dressing on; did they knock themselves; did they have a fall where they sustained the wound? Some dressings may not be visible. • Ask if they have a history of swelling in their feet and ankles. • Observe the feet and ankles for the presence of swelling.

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	• Where possible, perform a 10-second pitting test, which involves pressing the thumb on the top of the foot and behind the ankle bones on both feet. Observe if a dent is created. • If swelling is observed or a dent is created, a referral to a health professional is instigated for further assessment and management. <u>Recommendations:</u> • Recommendation/referral to GP or dermatologist. Support resources: • Skin conditions | healthdirect • What is Lymphoedema?

Bodily pain

Question: During the past month, has it often been too painful to do many of your day to day activities?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from triage (if it has often been too painful to do day to day activities in past month question)
Response guidance	<u>Context:</u> • The assessor should identify whether the client has experienced any pain or discomfort during the past month. • Pain can be a major contributor to a person's physical and psychological wellbeing. It is subjective. Regular pain medication is one strategy that can be effective for a client to manage their day-to-day tasks. <u>Consider and record:</u> • If the client has often been in too much pain to do many day-to-day activities in the past month. • How the pain impacts the client's daily activities.

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Question: During the past month, has it often been too painful to do many of your day to day activities?	

	• Any strategies the client currently has in place to manage pain.
	
	<u>Prompts and/or observations:</u>
	
	• Have you experienced much pain in the last month?
	• How often do you experience this pain?
	• Do you find pain impacts your ability to undertake day-to-day activities?
	• Signs of pain can include:
	  ○ Facial grimaces;
	  ○ Flinching or protective reactions, rubbing an area;
	  ○ Limping, shuffling;
	  ○ Avoiding certain movements or actions;
	  ○ Breathing and voice changes, or interruption of speech flow;
	  ○ Disfluency in movement;
	  ○ Red, swollen joints or other areas; and
	  ○ Signs of consumption of painkillers or alcohol to manage pain.
	
	<u>Recommendations:</u>
	
	• Recommendation/referral to GP or pain clinic.

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Details of bodily pain

Question: Please specify	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	<u>Context:</u> • The assessor should summarise details on any pain or discomfort experienced by the client during the past month. • Pain can be divided into five main categories: ○ **Nociceptive Pain:**

	▪ Somatic Pain – this pain is often described as a sharp, aching or gnawing sensation and can be localised. This type of pain can be related to complaints related to skin, muscles or bone. ▪ Visceral Pain – this pain is often described as dull, deep, and poorly localised. This type of pain can be related to body organs such as cardiac, liver or pulmonary. ○ **Neuropathic Pain:** This pain is often described as shooting, burning or tingling sensations and can be caused by lesions or dysfunction of the nervous system. Examples include phantom limb pain due to amputation, stroke and diabetic neuropathy. ○ **Cancer Pain:** The pain experienced by clients who have cancer is generally derived from the cancer itself. Pain in cancer can derive, for example, from a tumour compressing or infiltrating tissue. ○ **Psychological:** Psychological and or psychiatric factors are rarely the only cause of this type of pain. The severity of the reported pain can be derived from the wellness of the client in relation to their mental health. ○ **Mixed or unspecific Pain:** This is pain that can be related to unspecified mechanisms such as recurrent headaches or fibromyalgia. Consider and record: • The type of pain experienced by the client. • The cause of the pain. • The level of pain. • Where the pain occurs. • What impact the pain has on their ability to complete functional activities or ability to sleep. • Strategies used to manage the pain (e.g. medication, massage, heat/cold pack, changing position on a regular basis, sleeping upright in a chair or attendance at a pain clinic). <u>Prompts and/or observations:</u> • Can you share more details on how your pain impacts you? • What are some of the experiences you have with your pain? Where does the pain occur and is there anything that can be visually seen where the pain is?

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	• Signs of pain can include:
	  ○ Facial grimaces
	  ○ Flinching or protective reactions, rubbing an area
	  ○ Limping, shuffling
	  ○ Avoiding certain movements or actions
	  ○ Breathing and voice changes, or interruption of speech flow
	  ○ Disfluency in movement
	  ○ Red, swollen joints or other areas
	  ○ Signs of consumption of painkillers or alcohol to manage pain.
	
	<u>Recommendations:</u>
	
	• Recommendation/referral to GP or pain clinic.

Sleep

Question: Do you experience any difficulties with sleep (e.g. difficulty falling asleep, fragment sleep, insufficient sleep)?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	<u>Context:</u> • The assessor should identify whether the client experiences any difficulties sleeping. • Sleep patterns can often change with age. Sleeping difficulties can be due to diseases such as dementia (constant wandering at night), alcohol use, congestive heart failure, depression, pain, arthritis and urinary problems. <u>Consider and record:</u> • Specify if the client has sleeping difficulties. For example, issues which may affect a client sleeping can include increased toileting, feeling worried, not being as active as they used to be, pain, drinking coffee late at night, medication (i.e. diuretics being taken after 6pm).

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Question: Do you experience any difficulties with sleep (e.g. difficulty falling asleep, fragment sleep, insufficient sleep)?	
	Prompts and/or observations: • How many hours a night do you sleep? • What medication do you take at night and when? • How many times per night do you wake? • Have you noticed any changes to your sleep patterns? • Do you experience any pain at night? • How many times do you get up to go to the toilet? • Do you feel tired when you wake up? • Do you think you are getting enough sleep? • Do you nap during the day? • What do you do to help you fall asleep e.g. reading or a glass of sherry? Recommendations: • Recommendation/referral to GP or sleep clinic. Support resources: • Sleep - stages, tips, disorders, apnoea | healthdirect

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Sleep details

Question: Please specify	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • The assessor should summarise details on any sleep difficulties being experienced by the client. Consider and record: • Specify details of the sleeping difficulties that the client experiences. For example, issues which may affect a client sleeping can include increased toileting, feeling worried,

	not being as active as they used to be, pain, drinking coffee late at night, medication i.e. diuretics being taken after 6pm. • Record the symptoms of sleep problems. For example, difficulty falling asleep, fragmented sleep, insufficient sleep, pain impacting on sleep, difference between night and day and early morning awakening. Prompts and/or observations: • How many hours a night do you sleep? • What medication do you take at night and when? • How many times per night do you wake? • Have you noticed any changes to your sleep patterns? • Do you experience any pain at night? • How many times do you get up to go to the toilet? • Do you feel tired when you wake up? • Do you think you are getting enough sleep? • Do you nap during the day? • What do you do to help you fall asleep e.g. reading or a glass of sherry? Recommendations: • Recommendation/referral to GP or sleep clinic. Support resources: • Sleep - stages, tips, disorders, apnoea | healthdirect

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More than six alcoholic drinks in an occasion

Question: How often do you have six or more drinks on one occasion?	
Response options	• Never • Less than monthly • Monthly • Weekly • Daily or almost daily
Question rules	**Base question**
Pre-populated information	No

Response guidance	Context: • The assessor should seek to understand how often the client has six or more drinks on one occasion. Consider and record: • Use standard drinks as the basis for measuring six or more drinks (i.e. one pint of full strength beer is roughly two standard drinks). • One occasion could be considered as per day or per drinking session. If the client is having multiple drinking sessions per day, a drinking session would conclude when a client no longer has alcohol in their blood. Prompts and/or observations: • How often do you have a drink containing alcohol? • How many standard drinks do you have on a typical day? • How often would you have six or more drinks on one occasion? Recommendations: • Recommendation/referral to GP. Support resources: • Alcohol | healthdirect

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Details of alcohol use

Question: Details of alcohol use	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • The assessor should provide further details on the client's alcohol use.

	Consider and record: • How often the client drinks alcohol. • Any indications about the client's drinking habits – are they social with friends/family, during meals etc. • If their drinking preferences change throughout the year or in different circumstances. Prompts and/or observations: • On what occasions would you typically have more than 6 alcoholic drinks? • When do you most likely have a drink? What are you doing in these situations? • Do you drink different amounts at different times of the year? Recommendations: • Recommendation/referral to GP. Support resources: • Alcohol | healthdirect

Smoking

Question: Do you smoke or have you smoked in the past?	
Response options	• Never smoked • Has quit smoking • Currently smokes
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • The assessor should seek to determine if the client currently smokes or has previously smoked. Consider and record:

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Question: Do you smoke or have you smoked in the past?	
	• If the client currently smokes or previously smoked in the past. • If 'has quit smoking' or 'currently smokes' is the selected response, the assessor will be prompted to ask follow up questions. Prompts and/or observations: • Are you a smoker? • Were you a smoker? • When did you quit? • Do you sometimes relapse into smoking? Support resources: • Quitting smoking and vaping | healthdirect

When did you quit smoking

Question: When did you quit smoking?	
Response options	Textbox for written response
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • The assessor should understand when the client quit smoking. Consider and record: • Record when they ceased smoking. Prompts and/or observations: • When was the last time you smoked? • When did you stop smoking?

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Desire to be a smoker

Question: Do you want to be a smoker?	
Response options	• Yes • No
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • The assessor should seek to determine if the client wishes to be a smoker. Consider and record: • If the client has indicated if they wish to remain a smoker. Prompts and/or observations: • Have you ever considered quitting? • Are you happy with smoking or were you wanting to quit? Recommendations: • Referral to a quit smoking program. Support resources: • Quitting smoking and vaping | healthdirect

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Illicit drug and/or prescription medication for non-medical reasons

Question: In the past year, have you used an illegal or prescriptive drug for non medical reasons?	
Response options	• Never • Once or twice • Monthly • Weekly • Daily or almost daily
Question rules	**Base question**

Question: In the past year, have you used an illegal or prescriptive drug for non medical reasons?	
Pre-populated information	No
Response guidance	Context: • The assessor should seek to understand if the client ever uses illegal drugs or prescriptive drugs for non-medical reasons? Consider and record: • If the client has used illegal drugs or prescriptive drugs for non-medical reasons in the past year. Prompts and/or observations: • Do you find any medications or drugs that you take addictive? • Are you ever tempted to use medications or drugs for non-medical purposes? • How often would you take these medications or drugs? Recommendations: • Recommendation/referral to GP. Support resources: • Overcoming addiction | healthdirect

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General and personal health observations

Question: General and personal health observations?	
Response options	Textbox for written response
Question rules	**Base question**

Question: General and personal health observations?	
Pre-populated information	Yes: • The response will pre-populate from triage (general health notes question)
Response guidance	Context: • Any notes from the previous questions on the client's physical and personal health. • This should include a summary of key areas of unmet needs. • This could include any related matters raised in response to questions. Consider and record: • If there was any conflicting information shared in response to the previous questions (e.g. if the client and a support person had different views to each other). • Some information from triage will automatically display in this text box. It is appropriate to edit this information with new details about the assessment if required, as this will still display in the triage section.

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Fraility

Falls or near falls in last 12 months

Question: Have you had any falls or near falls in the last 12 months?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • Whether the client has had any falls or near miss falls in the past 12 months. • A near miss fall is an event where someone was at risk of falling, but due to timely intervention or luck.

Question: Have you had any falls or near falls in the last 12 months?	
	Consider: • The number of falls and/or near misses. • The cause of the falls (e.g. a trip, slip, fainting or dizziness). • Contributing factors to the fall (e.g. vision impairment, injury, feet and footwear etc.). • Where the falls occurred. • Whether the client injured themselves or required medical attention/admission to hospital. • If the client's GP is aware of the falls. • If the client has attended a falls clinic. • Whether the client is afraid of falling. Prompts and/or observations: • Have you had any slips, trips, falls or near miss falls recently? • When did you last have a fall or a near miss fall?

Number of falls or near falls in last 12 months

Question: How many falls or near falls in the last 12 months?	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • The assessor should seek to determine how many falls or near miss falls that the client has experienced in the last 12 months. • This could be an estimate if there have been a number of experiences over this timeframe. • A near miss fall is an event where someone was at risk of falling, but due to timely intervention or luck. Consider: • The number of falls and/or near misses. • The cause of the falls (e.g. a trip, slip, fainting or dizziness).

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	• Contributing factors to the fall (e.g. vision impairment, injury, feet and footwear etc.). • Where the falls occurred. • Whether the client injured themselves or required medical attention/admission to hospital. • If the client's GP is aware of the falls. • If the client has attended a falls clinic. • Whether the client is afraid of falling. Prompts and/or observations: • Have you had any slips, trips, falls or near miss falls recently? • When did you last have a fall or a near miss fall?

Falls or near falls in last 4 weeks

Question: Have you had any falls or near falls in the last 4 weeks?	
Response options	• Yes • No
Question rules	**Base question**
Pre-populated information	Yes: • The response will pre-populate from triage (question on falls or near miss falls in last four weeks)
Response guidance	Context: • Whether the client has had any falls or near miss falls in the past four weeks. • A near miss fall is an event where someone was at risk of falling, but due to timely intervention or luck. Consider and record: • The number of falls and/or near misses. Prompts and/or observations: • Have you had any slips, trips, falls or near miss falls recently? • When did you last have a fall or a near miss fall?

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Number of falls or near falls in last 4 weeks

Question: How many falls or near falls in last 4 weeks?	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • The assessor should seek to determine how many falls or near miss falls that the client has experienced in the last four weeks. • This could be an estimate if there have been a number of experiences over this timeframe. • A near miss fall is an event where someone was at risk of falling, but due to timely intervention or luck. Consider and record: • The number of falls and/or near misses. Prompts and/or observations: • Have you had any slips, trips, falls or near miss falls recently? • When did you last have a fall or a near miss fall?

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Assessor notes about falls

Question: Assessors notes about falls	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • The assessor should include a summary of details shared by the client on falls or near miss falls.

Question: Assessors notes about falls	
	• A near miss fall is an event where someone was at risk of falling, but due to timely intervention or luck. <u>Consider and record:</u> • The number of falls and/or near misses. • The cause of the falls (e.g. a trip, slip, fainting or dizziness). • Contributing factors to the fall (e.g. vision impairment, injury, feet and footwear etc.). • Where the falls occurred. • Whether the client injured themselves or required medical attention/admission to hospital. • If the client's GP is aware of the falls. • If the client has attended a falls clinic. • Whether the client is afraid of falling. <u>Prompts and/or observations:</u> • Do you have any concerns about falls in your current living arrangement? • Are there any common causes for your falls or near miss falls? • Do the falls or near miss falls typically happen in similar locations? • Have you injured yourself from a fall? • What treatment have you received from a fall? • Are you seeing any health professional to try to minimise falls in the future?

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Unintentional weight loss in last three months

Question: Have you unintentionally lost in any weight in the last three months?	
Response options	• No weight loss • 1-5 kgs or less than 5% of body weight • More than 5kg or more than 5% of body weight
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	<u>Context:</u>

Question: Have you unintentionally lost in any weight in the last three months?	
	• The assessor should seek to identify if the client has had any unintentional weight loss over the last three months. • Unplanned weight loss happens when someone loses a significant amount of weight, without deliberately being on a weight loss plan. • Unplanned weight loss is likely to lower a person's general wellbeing and quality of life. It can also increase their risk of serious health issues such as hip fracture, poor wound healing and malnutrition. <u>Consider and record:</u> • If the client has had any unintentional weight loss over the last three months. <u>Prompts and/or observations:</u> • Have you gained or lost weight recently? • How long have you been at your current weight? • Have any of your friends or family commented on your weight recently? • Have circumstances affected what you eat, how you prepare meals or difficulties with shopping? • Have you had a change in appetite lately? • Has your interest in food changed recently? <u>Recommendations:</u> • Recommendation/referral to GP or dietitian.

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Fatigue over last four weeks

Question: How much of your time in the past 4 weeks did you feel tired?	
Response options	• All the time • Some, a little or none of the time
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	<u>Context:</u>

Question: How much of your time in the past 4 weeks did you feel tired?	
	• The assessor should seek to understand if the client is impacted by fatigue in the last four weeks. • Fatigue is a feeling of constant exhaustion, burnout, or lack of energy. It can manifest as physical fatigue, mental fatigue, or a combination of both. Consider and record: • If the client has experienced much fatigue over the last four weeks. Prompts and/or observations: • How often do you feel tired? • Have you had any issues with tiredness lately? • What is the cause of any tiredness? • Do you feel exhausted, burnt out or lack energy? Support resources: • Fatigue | healthdirect

Difficulty walking up to 10 steps without resting over last four weeks

Question: In the past 4 weeks, by yourself and not using aids, do you have any difficulty walking up 10 steps without resting?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • The assessor should seek to understand if the client has any recent difficulty walking up 10 stairs without resting. • This question is based on the client's ability without any aids. Consider and record:

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Question: In the past 4 weeks, by yourself and not using aids, do you have any difficulty walking up 10 steps without resting?	
	• If the client can walk up 10 stairs without resting and without needing an aid. Prompts and/or observations: • Are you able to travel up stairs? • How many flights of stairs would you find difficult to walk up? • How do you travel up stairs? • Do you need to rest after travelling up stairs? • Has there been any changes in your ability to walk up stairs in the past four weeks?

Difficulty walking 300 metres or around the block over last four weeks

Question: In the past 4 weeks, by yourself and not using aids, do you have any difficulty walking 300 m or around the block?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • The assessor should seek to understand if the client has any recent difficulty walking 300 metres or around the block • This question is based on the client's ability without any aids. Consider and record: • If the client can walk 300 metres or around the block. • Use 300 metres as the basis for this question if a block for the client is not roughly this distance. Prompts and/or observations: • How far do you think you can walk before you need a rest? • Are you able to walk a few hundred metres?

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Question: In the past 4 weeks, by yourself and not using aids, do you have any difficulty walking 300 m or around the block?	
	• Has there been any changes in your ability to walk in the past four weeks?

Illnesses

Question: Does the client have any of these illnesses?	
Response options	• Hypertension • Diabetes • Cancer (not a minor skin cancer) • Chronic lung disease • Heart attack • Congestive heart failure • Angina • Asthma • Arthritis • Kidney disease
Question rules	**Base question**
Pre-populated information	No

Response guidance	Context:
	• The assessor should identify any illnesses being experienced by the client.
	
	Consider and record:
	• Multiple response options may be selected if the client is experiencing more than one major skin condition.
	• Use the below definitions to assist with the response.
	  ○ **Hypertension:** commonly known as high blood pressure, a condition where the force of blood against the walls of your arteries is consistently too high.
	  ○ **Diabetes:** also known as diabetes mellitus, a condition characterized by elevated levels of glucose (a type of sugar) in the blood.
	  ○ **Cancer (not a minor skin cancer):** a disease that originates from the body's cells. Normally, cells grow and multiply in a controlled manner. However, sometimes these cells

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Question: Does the client have any of these illnesses?	
	become abnormal and continue to grow unchecked. These abnormal cells can form a mass called a tumour. The term "cancer" actually encompasses about 100 different diseases. ○ **Chronic lung disease:** refers to a group of long-term conditions that affect the lungs, making it difficult to breathe. These conditions can worsen over time and significantly impact daily activities. ○ **Heart attack:** also known as a myocardial infarction, occurs when the blood supply to a part of the heart muscle is suddenly blocked. ○ **Congestive heart failure:** a chronic condition where the heart's ability to pump blood efficiently is compromised. ○ **Angina:** also known as angina pectoris, a condition characterized by chest pain or discomfort. ○ **Asthma:** a common condition that affects the airways in your lungs. People with asthma have sensitive airways that become inflamed when exposed to triggers. ○ **Arthritis:** a term that encompasses a group of conditions affecting the joints in your body. These conditions cause damage to the joints, often resulting in discomfort and pain. ○ **Kidney disease:** also known as chronic kidney disease (CKD), involves a gradual loss of kidney function. <u>Prompts and/or observations:</u> • Are you experiencing any of these illnesses? (run through list)

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Assessor observations on frailty

Question: Assessors notes about frailty	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No

Question: Assessors notes about frailty	
Response guidance	Context: • This is to provide a holistic summary of any frailty concerns for the client. Consider and record: • Additional details on all concerns raised by the client on falls, near miss falls, unintentional weight loss, fatigue and difficulty walking. Prompts and/or observations: • Can you please share some more details about some of the concerns you have raised? • How long have you been experiencing the concern? • Have you been to see a health professional about your concern? • How does the concern impact you day-to-day? • Is there anything else you do to manage the concern?

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Social section

The purpose of the social section of the IAT is to explore any client concerns relating to their family, community engagement and support circumstances, if flagged by the client.

Feeling lonely, down or socially isolated

Question: Do you ever feel lonely, down or socially isolated?	
Response options	• No, not at all • Occasionally • Sometimes • Most of the time • Not sure
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: • The response will pre-populate from triage (ever feel lonely, down or socially isolated question)

Response guidance	Context:
	• The assessor should seek to understand if the client ever feels lonely, down or socially isolated.
	• Feelings of loneliness can be expressed as feeling lonesome, alone, deserted or isolated from friends/family/ their community.
	• Feeling lonely can be draining, distracting and upsetting.
	• The older population will sometimes seek companionship in an animal and this can alleviate loneliness.
	• It is important to understand a client's loneliness in regards to how they want to alleviate this feeling.
	• Social isolation is a major and prevalent health problem among older adults living in the community. It is defined as 'a state in which the individual lacks a sense of belonging socially, lacks engagement with others, has a minimal number of social contacts and they are deficient in fulfilling and quality relationships.'
	• Examples of social isolation include:
	  ○ Living arrangements where the person lives alone and has limited or no support from family, friends or neighbours
	  ○ Limited or no social contact through organisations such as church groups, sporting, or social clubs.

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Question: Do you ever feel lonely, down or socially isolated?	
	○ Where a person's capacity to live at home is at risk due to their geographic isolation and associated difficulties with effective service provision. Consider and record: • Consider the client's perception in response to this question, rather than the client's current social situation or other factors. • Use the below definitions to assist with the response. ○ **No, not at all:** the client never feels lonely, down or socially isolated. ○ **Occasionally:** the client feels lonely, down and/or socially isolated on very few occasions, but this does not concern them. ○ **Sometimes:** the client feels lonely, down and/or socially isolated on more than a few occasions. ○ **Most of the time:** the client often feels lonely, down and/or socially isolated. ○ **Not sure:** the client is not sure if they feel lonely, down and/or socially isolated or the assessor is hearing conflicting information. Prompts and/or observations: • When was the last time you went on an outing? • What hobbies have you enjoyed doing? Do you still do them? • Have there been any changes to your usual daily routine? • Do you have a group of friends that you see regularly? • Are you happy with your social situation? • Do you ever feel that you would like to do more with others socially? • Do you ever feel a bit isolated from being able to participate in social activities? • Would you say you ever feel lonely on occasion? How often do you feel this way? • Would you say you ever feel down on occasion? How often do you feel this way?

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Validated tool: Good Spirit Good Life

Context:

The **Good Spirit Good Life** validated tool is for use with First Nations clients.

Instructions and interpretation:

Before commencing the validated tool, please clarify with the client that you would like to ask some questions on how they feel about their life today. There are no right or wrong answers.

Assessors should use their judgement on how to ask questions and requests related to this validated tool. Assessors will need to consider the circumstances and background of clients when following the validated tool questions, and ensure they are:

- Being mindful of appropriate and understandable language;
- Adapting questions to the context that is appropriate; and
- Making alternative prompts or suggestions where needed.

Most questions have the below response options. If answer provided is 'yes', prompt further with 'all the time', 'most of the time' or 'sometimes'. If answer provided is 'no', prompt further with 'not much' or 'never'.

Please note that an overall score is not used for the assessment, and recommendations and strategies from the client's outcomes from the validated tool are based on each individual response (i.e. those indicated as 'not much' or 'never').

Additional information and training resources:

Please refer to the below guidance material for information on completing this validated tool and appropriately asking questions.

- Please review the MAClearning element **Validated Assessment Tools in Practice** for further guidance on how and when to administer the validated tool with a client at an assessment.
- Guidance on Good Spirit Good Life is available at: https://www.aboriginalageingwellresearch.com/gsgl-resources (registration required to view)

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Family and friends

Question: Do you get to have a yarn and spend time with family or friends?	
Response options	• All the time • Most of the time • Sometimes • Not much • Never

Question: Do you get to have a yarn and spend time with family or friends?	
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Country

Question: Do you feel you spend enough time connecting to country?	
Response options	• All the time • Most of the time • Sometimes • Not much • Never
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Community

Question: Do you feel connected to the Aboriginal community?	
Response options	• All the time • Most of the time • Sometimes • Not much • Never
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Culture

Question: Do you feel connected to cultural ways?	
Response options	• All the time • Most of the time • Sometimes

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Question: Do you feel connected to cultural ways?	
	• Not much • Never
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Health

Question: Do you do things to take care of your health?	
Response options	• All the time • Most of the time • Sometimes • Not much • Never
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Respect

Question: Do you feel respected and valued as an elder/older person?	
Response options	• All the time • Most of the time • Sometimes • Not much • Never
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

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Elder role

Question: Do you feel you can share your knowledge and stories with the younger mob?	
Response options	• All the time • Most of the time • Sometimes • Not much • Never
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Support and services

Question: Do you feel the services you use are respectful and support your needs?	
Response options	• All the time • Most of the time • Sometimes • Not much • Never
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

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Safety and security

Question: Do you feel you have a safe place to live?	
Response options	• All the time • Most of the time • Sometimes • Not much • Never
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Spirituality

Question: Do you feel safe and supported in your spiritual beliefs?	
Response options	• All the time • Most of the time • Sometimes • Not much • Never
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Future planning

Question: Do you feel you have things in place as you grow older? (e.g. your future health and care, funeral wishes, family looked after).	
Response options	• All the time • Most of the time • Sometimes • Not much • Never
Question rules	**Specialised question** for a specialist assessor only. This question should only be completed by specialist assessors with appropriate cultural safety experience
Pre-populated information	No

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Basic needs

Question: Do you feel you have enough money to get by? (e.g. for food, housing, clothing).	
Response options	• All the time • Most of the time • Sometimes • Not much • Never
Question rules	**Specialised question** for a specialist assessor only. This question should only be completed by specialist assessors with appropriate cultural safety experience

Question: Do you feel you have enough money to get by? (e.g. for food, housing, clothing).	
Pre-populated information	No

Validated tool: Duke Social Support Index – Social Interaction Subscale

Context:

The **Duke Social Support Index**[9] (DSSI) intends to capture essential components of social support related to mental health outcomes and the use of health services in treating older individuals with non-psychiatric medical illnesses.

The DSSI was developed in the United States as a brief, easily administered instrument to determine an individual's level of social support. The DSSI explores two social elements – social interaction, and satisfaction with social support.

Instructions and interpretation:

The DSSI is not mandatory but anticipated to be used for most clients. The DSSI may not be culturally appropriate in some client cohorts (e.g., First Nations people, clients who have experienced adverse effects of institutionalisation, and/or systems abuse).

The assessor should view the client's record to see if there is any related information, and consider completing other sections of the IAT first (such as support considerations) to gauge if this validated tool is appropriate.

If the validated tool is appropriate, assessors should also use their judgement on how to ask questions and requests related to this validated tool. Assessors will need to consider the circumstances and background of clients when following the validated tool questions, and ensure they are:

- Being mindful of appropriate and understandable language;
- Adapting questions to the context that is appropriate; and
- Making alternative prompts or suggestions where needed.

Additional information and training resources:

[9] Landerman et al. D.G. (1989), Alternative models of the stress buffering hypothesis. American Journal of Community Psychology, 17: 625-642. https://doi.org/10.1007/BF00922639

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Please refer to the below guidance material for information on completing this validated tool and appropriately asking questions.

- Please review the MAClearning element **Validated Assessment Tools in Practice** for further guidance on how and when to administer this validated tool with a client at an assessment.
- Guidance on the DSSI is available at https://alswh.org.au/wp-content/uploads/2020/08/DDSSection2.7DSSI.pdf

People in your local area that you can depend on or feel close to

Question: Other than members of your family, how many persons in your local area do you feel you can depend on or feel very close to?	
Response options	• None • 1-2 people • More than 2 people
Question rules	**Base question**
Pre-populated information	No

Spending time with someone who does not live with you

Question: How many times during the past week did you spend time with someone who does not live with you, that is, you went to see them or they came to visit you or you went out together?	
Response options	• None • Once • Twice • Three times • Four times • Five times • Six times • Seven or more times
Question rules	**Base question**
Pre-populated information	No

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Number of times you communiated with someone in past week

Question: How many times did you talk or communicate to someone, friends, relatives or others on the telephone, mobile (e.g. text message) or social media (e.g. Facebook, snapchat, Instagram) in the past week (either they contacted you or you contacted them)	
Response options	• None • Once • Twice • Three times • Four times • Five times • Six times • Seven or more times
Question rules	**Base question**
Pre-populated information	No

Number of times going to a meeting or other group in past week

Question: About how often did you go to meetings of clubs, religious meetings or other groups that you belong to in the past week?	
Response options	• None • Once • Twice • Three times • Four times • Five times • Six times • Seven or more times
Question rules	**Base question**
Pre-populated information	No

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Does it seem family and friends understand you

Question: Does it seem that your family and friends (people who are important to you) understand you?	
Response options	• Hardly ever • Some of the time

Question: Does it seem that your family and friends (people who are important to you) understand you?	
	• Most of the time
Question rules	**Base question**
Pre-populated information	No

Feeling useful to your family and friends

Question: Do you feel useful to your family and friends (people important to you)?	
Response options	• Hardly ever • Some of the time • Most of the time
Question rules	**Base question**
Pre-populated information	No

Know what is going on with your family and friends

Question: Do you know what is going on with your family and friends?	
Response options	• Hardly ever • Some of the time • Most of the time
Question rules	**Base question**
Pre-populated information	No

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Feeling of being listened to when talking with your family and friends

Question: When you are talking with your family and friends, do you feel you are being listened to?	
Response options	• Hardly ever • Some of the time • Most of the time
Question rules	**Base question**
Pre-populated information	No

Feeling of having a definite role with your family and friends

Question: Do you feel you have a definite role (place) in your family and among your friends?	
Response options	• Hardly ever • Some of the time • Most of the time
Question rules	**Base question**
Pre-populated information	No

Talking about your deepest problems with a family or friend

Question: Can you talk about your deepest problems with at least some of your family and friends?	
Response options	• Hardly ever • Some of the time • Most of the time
Question rules	**Base question**
Pre-populated information	No

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Satisfaction with relationship with your family and friends

Question: How satisfied are you with the kinds of relationships you have with your family and friends?	
Response options	• Very dissatisfied • Somewhat dissatisfied • Satisfied
Question rules	**Base question**
Pre-populated information	No

Assessor observation about family, community engagement and support

Question: Assessors observation about family, community engagement and support	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • This is to provide a holistic summary about the client's family, community engagement and support network. Consider and record: • If the client is regularly in touch with family. • If the client is engaged in their local community. • If the client is regularly in touch with other people in their support network. Prompts and/or observations: • Do you keep in touch with your family? • Do you find your family helpful? • Do you do anything in your local community? What activities do you do? • Do you have any appetite to do activities in your local community? • Do you have a good support network that you can turn to when you need help? • Do you feel comfortable asking your family or support network for help?

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Cognition section

The purpose of this section is to explore any cognition limitations being experienced by the client.

Confirmed dementia diagnosis from a geriatrician or neurologist

Question: Does client have a confirmed dementia diagnosis from a geriatrician or neurologist?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • The assessor should seek to determine if the client has a confirmed dementia diagnosis from a geriatrician or neurologist. Consider and record: • If the client has a confirmed dementia diagnosis from a geriatrician or neurologist. • Dementia is a term used to describe a group of symptoms that affect the brain, interfering with daily life. It is not one specific disease. Here are some key points about dementia: ○ **Symptoms**: include memory loss, difficulty in communication, reduced ability to organise, plan, reason, or solve problems, difficulty handling complex tasks, confusion and disorientation, difficulty with coordination and motor functions, loss of or reduced visual perception. ○ **Psychological changes**: changes in personality and behaviour, depression, anxiety, hallucinations, mood swings, agitation, and apathy (lack of interest or emotions) are also observed. ○ **Causes**: Damage to brain cells is the primary cause of dementia. Causes for this damage include advanced age, family history, damage to blood vessels of the brain, accumulation of clumps of

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Question: Does client have a confirmed dementia diagnosis from a geriatrician or neurologist?	
	protein in the brain, genetic disorders such as Huntington's disease, mental and neurological disorders such as Parkinson's disease and depression, traumatic brain injury, infections which cause high fever, metabolic disorders such as thyroid problems and diabetes, certain medications, vitamin deficiencies, poisoning with heavy metals or pesticides, alcohol abuse, brain tumour or cancer, and enlarged structures of the brain. ○ **Diagnosis**: aims at finding at least two impaired mental functions that interfere with daily activities. Doctors may order several tests to confirm the diagnosis. ○ **Treatment**: Most types of dementia cannot be cured. Treatments aim at reducing symptoms and progression of the condition. <u>Prompts and/or observations:</u> • This may be a sensitive question to discuss with the client, and the assessor should manage this sensitivity carefully. • Some of the below links may assist with appropriate prompts and/or observations for this question. ○ Tests used in diagnosing dementia | healthdirect ○ Disorientation - symptoms, treatments and causes | healthdirect ○ Confusion - symptoms, causes and prevention | healthdirect ○ Delirium – symptoms, diagnosis and treatment | healthdirect ○ Brain fog | healthdirect ○ Worried about your memory? | healthdirect <u>Support resources:</u> • Dementia | healthdirect • Living with dementia | healthdirect • BrainTrack App | healthdirect

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Suitability to complete the KICA Cog

Question: Is it suitable the client complete the KICA COG?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • An assessor should use the KICA COG with First Nations clients only when it would be culturally appropriate to do so, and the assessor has appropriate cultural safety training and experience. • The questions in the KICA COG may be sensitive for the client, so it is important that an assessor is cautious of these potential sensitivities when administrating this validated tool. • Please review the MAClearning element **Validated Assessment Tools in Practice** for further guidance on how and when to administer this validated tool with a client at an assessment. Consider and record: • The assessor's judgement on the appropriateness of administering the KICA COG with the client at assessment. • If the client is able and willing to complete the KICA COG at assessment.

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Suitability to complete the KICA Cog regional urban

Question: Is it suitable the client complete the KICA COG regional urban?	
Response options	• Yes • No
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context:

Question: Is it suitable the client complete the KICA COG regional urban?	
	• An assessor should use the KICA COG regional urban with First Nations clients only when it would be culturally appropriate to do so, and the assessor has appropriate cultural safety training and experience. • The questions in the KICA COG regional urban may be sensitive for the client, so it is important that an assessor is cautious of these potentially sensitivities when administrating this validated tool. • Please review the MAClearning element **Validated Assessment Tools in Practice** for further guidance on how and when to administer this validated tool with a client at an assessment. <u>Consider and record:</u> • The assessor's judgement on the appropriateness of administering the KICA COG regional urban with the client at assessment. • If the client is able and willing to complete the KICA COG regional urban at assessment.

Suitability to complete Step 1 GP Cog

Question: Is it suitable the client complete the Step 1 GP Cog?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	<u>Context:</u> • An assessor should use Step 1 GP Cog if it is appropriate to screen for dementia. Step 1 is conducted with the client. • An assessor should be aware that there may be more culturally appropriate cognition screening tools for First Nations clients with the KICA Cog or the KICA Cog urban regional (which should also only be used in culturally appropriate and if the assessor has appropriate cultural safety training and experience). • Please review the MAClearning element **Validated Assessment Tools in Practice** for further guidance on how

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Question: Is it suitable the client complete the Step 1 GP Cog?	
	and when to administer this validated tool with a client at an assessment. Consider and record: • The assessor's judgement on the appropriateness of administering the Step 1 GP Cog with the client at assessment. • If the client is able and willing to complete the Step 1 GP Cog at assessment.

Informant available to complete Step 2 GP Cog

Question: Is there an informant available to complete GPCog Step 2?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete. This question will be presented to all assessors.
Pre-populated information	No
Response guidance	Context: • An assessor should use Step 2 GP Cog if it is appropriate to undertake follow up screening for dementia. Step 2 is conducted with an appropriate support person if recommended based on the results from Step 1 GP Cog. • An assessor should be aware that there may be more culturally appropriate cognition screening tools for First Nations clients with the KICA Cog or the KICA Cog urban regional (which should also only be used in culturally appropriate and if the assessor has appropriate cultural safety training and experience). • Please review the MAClearning element **Validated Assessment Tools in Practice** for further guidance on how and when to administer this validated tool with a client at an assessment. Consider and record: • The assessor's judgement on the appropriateness of administering the Step 2 GP Cog with the client at

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Question: Is there an informant available to complete GPCog Step 2?	
	assessment (note a Step 2 GP Cog can only be undertaken by a clinical assessor). • If the client is able and willing to complete the Step 2 GP Cog at assessment.

Informant available to complete KICA carer

Question: Is there is an informant available to complete KICA carer?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete This question will be presented to all assessors.
Pre-populated information	No
Response guidance	<u>Context:</u> • An assessor should use the KICA carer with First Nations clients only when it would be culturally appropriate to do so, and the assessor has appropriate cultural safety training and experience. • The questions in the KICA carer may be sensitive for the client, so it is important that an assessor is cautious of these potential sensitivities when administrating this validated tool. • Please review the MAClearning element **Validated Assessment Tools in Practice** for further guidance on how and when to administer this validated tool with a client at an assessment. <u>Consider and record:</u> • The assessor's judgement on the appropriateness of administering the KICA carer with the client at assessment. • If the client is able and willing to complete the KICA carer at assessment.

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Validated tool: Step 1 GP Cog

Context:

The **GP-Cog** is a reliable, valid, and efficient instrument to screen for dementia. The GP-Cog score is not influenced by the cultural and linguistic background of a person making it an invaluable screening tool especially in multicultural patient settings.

Instructions and interpretation:

Assessor should read out each question as it is presented. However, assessors should use their judgement on requests related to this validated tool and will need to consider the circumstances and background of clients when following questions.

The GP-Cog Step 1 scores one point for each correct answer with a total maximum score of nine. A score of nine indicates no significant cognitive impairment. A total score of five to eight indicates more information is required, if the client scores zero to four, cognitive impairment is indicated, and further investigation is warranted. In short, if one of the answers is incorrect, further cognitive assessment is triggered.

Additional information and training resources:

Please refer to the below guidance material for information on completing this validated tool and appropriately asking questions.

- Please review the MAClearning element **Validated Assessment Tools in Practice** for further guidance on how and when to administer this validated tool with a client at an assessment.
- Guidance on the GP-Cog is available at gpcog.com.au.

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Confirmation of date

Question: What is the date? (exact only)	
Response options	• Correct • Incorrect
Question rules	**Threshold questions** are mandatory to complete. If the client has answered any of the questions in GPCog- Step 1 incorrectly, GPCog Step 2 and subsequent Extended Cognitive Assessment section must be completed. This question will be presented to all assessors.
Pre-populated information	No

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Mark in all numbers to indicate the hours of a clock

Question: Please mark in all the numbers to indicate the hours of a clock (correct spacing required)	
Response options	• Correct • Incorrect
Question rules	**Threshold questions** are mandatory to complete. If the client has answered any of the questions in GPCog- Step 1 incorrectly, GPCog Step 2 and subsequent Extended Cognitive Assessment section must be completed. This question will be presented to all assessors.
Pre-populated information	No

Mark in time to show 10 minutes past eleven o'clock

Question: Please mark in hands to show 10 minutes past eleven o'clock (11:10)	
Response options	• Correct • Incorrect
Question rules	**Threshold questions** are mandatory to complete. If the client has answered any of the questions in GPCog- Step 1 incorrectly, GPCog Step 2 and subsequent Extended Cognitive Assessment section must be completed. This question will be presented to all assessors.
Pre-populated information	No

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Something that has happened in the news recently

Question: Can you tell me something that happened in the news recently?	
Response options	• Correct • Incorrect
Question rules	**Threshold questions** are mandatory to complete. If the client has answered any of the questions in GPCog- Step 1 incorrectly, GPCog Step 2 and subsequent Extended Cognitive Assessment section must be completed. This question will be presented to all assessors.

Pre-populated information	No

Name and address to remember

Question: What was the name and address I asked you to remember?	

Response options	• Correct
	• Incorrect for one of the following items:
	  ○ John
	  ○ Brown
	  ○ West Street
	  ○ Kensington
	  ○ 42

Question rules	**Threshold questions** are mandatory to complete. If the client has answered any of the questions in GPCog- Step 1 incorrectly, GPCog Step 2 and subsequent Extended Cognitive Assessment section must be completed. This question will be presented to all assessors.
Pre-populated information	No

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Validated tool: Step 2 GP Cog

Context:

The **GP-Cog** is a reliable, valid, and efficient instrument to screen for dementia. The GP-Cog score is not influenced by the cultural and linguistic background of a person making it an invaluable screening tool especially in multicultural patient settings.

Instructions and interpretation:

The GP-Cog Step 2 is undertaken with the client's support person/carer if the client scores five to eight on the GP-Cog Step1 or is unable to complete GP-Cog Step 1.

The support person/carer is asked a series of six questions comparing aspects of the client's cognitive ability to five to ten years ago. A score of four to six indicates no significant cognitive impairment while a score of zero to three indicates cognitive impairment.

Assessors should use their judgement on how to ask questions and requests related to this validated tool. Assessors will need to consider the circumstances and background of the support person and client when following the validated tool questions, and ensure they are:

Being mindful of appropriate and understandable language; adapting questions to the context that is appropriate; and Making alternative prompts or suggestions where needed.

Additional information and training resources:

Please refer to the below guidance material for information on completing this validated tool and appropriately asking questions.

- Please review the MAClearning element **Validated Assessment Tools in Practice** for further guidance on how and when to administer this validated tool with a client at an assessment.
- Guidance on the GP-Cog is available at gpcog.com.au.

Informant's name

Question: Informant's name	
Response options	• Textbox for written response
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

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Date of informant interview

Question: Date of informant interview	
Response options	• Enter date into calendar
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Trouble remembering things that have happened recently

Question: Does the patient have more trouble remembering things that have happened recently than s/he used to?	
Response options	• Yes • No • Don't know • Not applicable
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Trouble recalling conversations a few days later

Question: Does he or she have more trouble recalling conversations a few days later?	
Response options	• Yes • No • Don't know • Not applicable
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

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Question: When speaking, does the patient have more difficulty in finding the right word or tend to use the wrong words more often?	
Response options	• Yes • No • Don't know • Not applicable
Question rules	This question will be presented to all assessors.

	If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Manage money and financial affairs

Question: Is the patient less able to manage money and financial affairs (e.g. paying bills, budgeting)?	
Response options	• Yes • No • Don't know • Not applicable
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Assistance with transport (either private or public)

Question: Does the patient need more assistance with transport (either private or public)? (If the patient has difficulties due only to physical problems, e.g. bad leg, tick 'no')	
Response options	• Yes • No • Don't know • Not applicable
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

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Validated tool: KICA Cog

Context:

The Kimberley Indigenous Cognitive Assessment (KICA – COG) is the only validated dementia Assessment tool for older Indigenous Australians. It is recommended for use with rural and remote Indigenous Australians aged 45 years and above for whom other dementia assessments are not suitable.

The KICA was adapted from cognitive assessment tools in current use and refined after extensive consultation with community members of the Kimberley, including members of the Kimberley Aboriginal Medical Service Council (KAMSC), Kimberley Aged and Community Services (KACS), Kimberley Interpreting Service (KIS), psychologists and linguists.

The KICA was translated into Walmajarri, a commonly used language originating from a desert area of the Kimberley. The KICA was validated with older Indigenous people of the Kimberley to assess cognitive status.

Instructions and interpretation:

The KICA-COG requires five common items – a comb, pannikin/cup, box of matched, plastic bottle (with top), and a watch/timer. A set of pictures are required to be presented to the client in order to assess visual naming, free recall and cued recall. Since language skills are being assessed, a trainer interpreter is recommended.

The KICA-Cog is out of 39. A score of 33 or below indicates possible dementia and a referral to a GP is recommended.

Additional information and training resources:

Please refer to the below guidance material for information on completing this validated tool and appropriately asking questions.

- Please review the MAClearning element **Validated Assessment Tools in Practice** for further guidance on how and when to administer this validated tool with a client at an assessment.
- Kimberley Indigenous Cognitive Assessment
- Instruction Booklet

Orientation

Topic: Orientation	
Questions	I'd like to see if you can remember things. I'll ask you some questions.

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Topic: Orientation	
	• Is this week pension/pay week? • What time of year is it now? • What is the name of this community/place?
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Recognition and naming

Topic: Recognition and naming	
Questions	Hold up each item in turn and ask – what do you call this? • Comb • Pannikin (cup) • Matches Hold up each item in turn and ask – what is this one for? • Comb • Pannikin (cup) • Matches
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

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Registration

Topic: Registration	
Questions	• Tell me those things I showed you
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Verbal comprehension

Topic: Verbal comprehension	
Questions	• Shut your eyes

Topic: Verbal comprehension	
	• First point to the sky and then point to the ground (1 point for each)
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Verbal fluency

Topic: Verbal fluency	
Questions	• Tell me the names of all the animals that people hunt.
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Recall

Topic: Recall	
Questions	From previous exercise when each object was hidden. • Where did I put the comb? • Where did I put the matches? • Where did I put the pannikin?
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

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Visual naming

Topic: Recall	
Questions	• I'll show you some pictures. You tell me what they are. Remember these pictures for later on. (boy, emu, billy/fire, crocodile, bicycle)
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Frontal/executive function

Topic: Frontal/executive function	
Questions	• Look at this. Now you copy.
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Free recall

Topic: Free recall	
Questions	• You remember those pictures I showed you before? What were those pictures? Tell me. (show boomerang as example)
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Cued recall

Topic: Cued recall	
Questions	• Which one did I show you before? (one of three pictures, use boomerang as example)
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Praxis

Topic: Praxis	
Questions	• Open this bottle and pour water into this cup • Show me how to use this comb
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

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Validated tool: KICA Cog Regional Urban

Context:

The **KICA – Cog Regional Urban** is a validated dementia assessment tool for older Indigenous Australians. It is recommended for Indigenous Australians aged 45 years and above for whom other dementia assessments are not suitable.

The KICA was adapted from cognitive assessment tools in current use and refined after extensive consultation with community members of the Kimberley, including members of the Kimberley Aboriginal Medical Service Council (KAMSC), Kimberley Aged and Community Services (KACS), Kimberley Interpreting Service (KIS), psychologists and linguists.

Instructions and interpretation:

The KICA-Cog requires five common items – as outlined in the questions. A set of pictures are required to be presented to the client in order to assess visual naming, free recall and cued recall. Since language skills are being assessed, a trainer interpreter is recommended.

Assessor should read out each question as it is presented. However, assessors should use their judgement on requests related to this validated tool and will need to consider the circumstances and background of clients when following questions.

The KICA-Cog is scored out of 39, which each correct answer representing one point. A score of 33 (six incorrect answers) or below indicates possible dementia and a referral to a GP is recommended.

The regional urban version includes tailored questions for the setting.

Additional information and training resources:

Please refer to the below guidance material for information on completing this validated tool and appropriately asking questions.

- Please review the MAClearning element **Validated Assessment Tools in Practice** for further guidance on how and when to administer this validated tool with a client at an assessment.
- Guidance on the KIKA Cog Urban Regional is available at [Indigenous Cognitive Assessment: Regional and Urban KICA | National Ageing Research Institute Limited (nari.net.au)]

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Orientation

Topic: Orientation	
Questions	I'd like to see if you can remember things. I'll ask you some questions. • Is this week pension/pay week? • What time of year is it now? • What is the name of this community/place?
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Recognition and naming

Topic: Recognition and naming	
Questions	Hold up each item in turn and ask – what do you call this? • Comb • Pannikin (cup) • Matches Hold up each item in turn and ask – what is this one for? • Comb • Pannikin (cup) • Matches
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

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Registration

Topic: Registration	
Questions	• Name me those things I showed you
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Verbal comprehension

Topic: Verbal comprehension	
Questions	• Shut your eyes • First point to the sky/ceiling (if indoors) and then point to the ground/floor (if indoors) (1 point for each)
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Verbal fluency

Topic: Verbal fluency	
Questions	• Tell me the names of as many different animals as you can. We'll see how many different animals you can name. Ready?
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

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Recall

Topic: Recall	
Questions	From previous exercise when each object was hidden. • Where did I put the comb? • Where did I put the matches? • Where did I put the pannikin?
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Visual naming

Topic: Recall	
Questions	• I'll show you some pictures and you tell me what they are. Let's practice. Show guitar. Point to picture and ask 'what is this?' (don't include in score)

Topic: Recall	
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Frontal/executive function

Topic: Frontal/executive function	
Questions	• Look at this. Now you copy.
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Free recall

Topic: Free recall	
Questions	• Do you remember those pictures I showed you before? What were those pictures? Tell me. (show boomerang as example)
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

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Cued recall

Topic: Cued recall	
Questions	• Which one did I show you before? (one of three pictures, use boomerang as example)
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Praxis

Topic: Praxis	
Questions	• Open this bottle and pour water into this cup • Show me how to use this comb
Question rules	Question for assessors with experience working with First Nations clients
Pre-populated information	No

Extended cognitive assessment

The below extended cognition assessment questions are completed if the results from the completed base cognition questions and validated tools indicate cognitive impairment.

Short term memory problems

Question: Short term memory problems	
Response options	• Unable to determine • Never • Occasionally • Regularly • Always
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No
Response guidance	Context: • The assessor should seek to determine if the client is experiencing any short-term memory problems. • When a client experiences short term memory loss, they can remember incidents from 20 years ago but are unable, for example, to remember details of events that happened 20 minutes ago. Each client may have different time deficits. Consider and record:

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Question: Short term memory problems	

	• If the client may be experiencing any short-term memory problems.
	• Use the below definitions to assist with the response.
	  ○ **Unable to determine:** it is unclear if the client is experiencing any short-term memory problems or the assessor has received conflicting information.
	  ○ **Never:** the client is never experiencing short-term memory problems.
	  ○ **Occasionally:** the client experiences short-term memory problems on a few occasions.
	  ○ **Regularly:** the client is regularly experiencing short-term memory problems (often).
	  ○ **Always:** the client is always experiencing short-term memory problems.
	
	Prompts and/or observations:
	
	• Do you sometimes find it difficult to remember things?
	• Do you find it easy to remember memories from when you were younger?
	• Do you find it easy to remember events from the day or the week before?
	• Observations to look for:
	  ○ Asking the same questions repeatedly.
	  ○ Difficulty following directions.
	  ○ Increased confusion about time, people and places.
	
	Support resources:
	
	• Dementia - early signs, symptoms, treatment and statistics | healthdirect

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Long term memory problems

Question: Long term memory problems	
Response options	• Unable to determine • Never • Occasionally • Regularly • Always
Question rules	This question will be presented to all assessors.

	If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Response guidance	<u>Context:</u>
	
	• The assessor should seek to determine if the client is experiencing any long-term memory problems.
	• In contrast to short term memory problems a person is able to remember events/details within a short time period but is unable, for example, to remember events/details from their childhood. Each client may have different time deficits.
	
	<u>Consider and record:</u>
	
	• If the client may be experiencing any short-term memory problems.
	• Use the below definitions to assist with the response.
	  ○ **Unable to determine:** it is unclear if the client is experiencing any long-term memory problems or the assessor has received conflicting information.
	  ○ **Never:** the client is never experiencing long-term memory problems.
	  ○ **Occasionally:** the client experiences long-term memory problems on a few occasions.
	  ○ **Regularly:** the client is regularly experiencing long-term memory problems (often).
	  ○ **Always:** the client is always experiencing long-term memory problems.
	
	<u>Prompts and/or observations:</u>
	
	• Do you sometimes find it difficult to remember things?
	• Do you find it easy to remember memories from when you were younger?
	• Do you find it easy to remember events from the day or the week before?
	• Observations to look for:
	  ○ Asking the same questions repeatedly.
	  ○ Difficulty following directions.
	  ○ Increased confusion about time, people and places.

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	Support resources: • Dementia - early signs, symptoms, treatment and statistics | healthdirect

Impaired judgement

Question: Impaired judgement	
Response options	• Unable to determine • Never • Occasionally • Regularly • Always
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Response guidance	Context:
	
	• The assessor should seek to determine if the client has impaired judgement.
	• Impaired judgement is a condition which results in a person not being able to make good decisions due to underlying medical problems.
	
	Consider and record:
	
	• If the client may have impaired judgment.
	• Use the below definitions to assist with the response.
	  ○ **Unable to determine:** it is unclear if the client is experiencing any impaired judgement or the assessor has received conflicting information.
	  ○ **Never:** the client is never experiencing any impaired judgement.
	  ○ **Occasionally:** the client experiences impaired judgment on a few occasions and/or in a few occasional circumstances.
	  ○ **Regularly:** the client is regularly experiencing impaired judgement (often).

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	○ **Always:** the client is always experiencing impaired judgement. Prompts and/or observations: • Do you sometimes find it difficult to make the right decision? • Do you know if any difficulties to make the right decision is from any health concerns?

Delirium

Question: Delirium	
Response options	• Unable to determine • Never • Occasionally • Regularly • Always
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No
Response guidance	Context: • The assessor should seek to determine if the client experiences delirium. • Delirium is an acute change in mental status characterised by a disturbance of consciousness, attention, cognition and perception that can develop hours to a few days. Consider and record: • If the client may experience delirium. • Use the below definitions to assist with the response. ○ **Unable to determine:** it is unclear if the client is experiencing any delirium or the assessor has received conflicting information. ○ **Never:** the client is never experiencing delirium.

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	○ **Occasionally:** the client experiences delirium on a few occasions. ○ **Regularly:** the client is regularly experiencing delirium (often). ○ **Always:** the client is always experiencing delirium. <u>Prompts and/or observations:</u> • Do you ever feel a sudden change in your thinking and behaviour? • Are you sometimes confused or forgetful? • Are you sometimes unsure of the time or where you are? • Do you sometimes struggle to pay attention? <u>Support resources:</u> • Delirium – symptoms, diagnosis and treatment | healthdirect

At risk behaviour

Question: At risk behaviour	
Response options	• Unable to determine • Never • Occasionally • Regularly • Always
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No
Response guidance	<u>Context:</u> • The assessor should seek to determine if the client appears to display at risk behaviours. • At risk behaviours are any behaviour that put the client or others at risk of harm. <u>Consider and record:</u>

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	• If the client appears to display at risk behaviour.
	• Use the below definitions to assist with the response.
	  ○ **Unable to determine:** it is unclear if the client displays at risk behaviours or the assessor has received conflicting information.
	  ○ **Never:** the client is never displaying at risk behaviour
	  ○ **Occasionally:** the client displays at risk behaviour on a few occasions.
	  ○ **Regularly:** the client is regularly displaying at risk behaviour (often).
	  ○ **Always:** the client is always displaying at risk behaviour.
	
	<u>Prompts and/or observations:</u>
	
	• Ask open-ended questions:
	  ○ Encourage dialogue by asking questions that allow the person to express themselves freely.
	• Listen actively:
	  ○ Be an attentive listener without judgment.
	  ○ Show empathy and validate their feelings.
	  ○ Avoid interrupting or rushing the conversation.
	• Observe signs and cues:
	  ○ Pay attention to behavioural cues that might indicate distress or risk:
	  ▪ Appearance: bloodstains, carrying potential weapons.
	  ▪ Physical activity: restlessness, agitation, clenched fists, hostile expressions.
	  ▪ Mood: anger, anxiety, tension, difficulty controlling emotions.
	  ▪ Speech: loud, threatening, slurred.

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Confusion

Question: Confusion	
Response options	• Unable to determine • Never • Occasionally • Regularly • Always
Question rules	This question will be presented to all assessors.

	If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Response guidance	<u>Context:</u>
	
	• The assessor should seek to understand If the client displays any signs of confusion.
	• Confusion as a behaviour can come on quickly or slowly over time depending on the cause.
	
	<u>Consider and record:</u>
	
	• If the client displays signs of confusion.
	• Use the below definitions to assist with the response.
	  ○ **Unable to determine:** it is unclear if the client displays signs of confusion or the assessor has received conflicting information.
	  ○ **Never:** the client is never displaying signs of confusion
	  ○ **Occasionally:** the client displays signs of confusion on a few occasions.
	  ○ **Regularly:** the client is regularly displaying signs of confusion (often).
	  ○ **Always:** the client is always displaying signs of confusion.
	
	<u>Prompts and/or observations:</u>
	
	• Do you find it easy to follow what is going on around you?
	• Are you sometimes confused with what someone is saying to you or what they are doing?
	• Do you have any medications that may have confusion as a side effect? Do you experience this side effect at all?
	
	<u>Support resources:</u>
	
	• Confusion - symptoms, causes and prevention | healthdirect

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Disorientation – time

Question: Disorientation	time
Response options	• Unable to determine • Never • Occasionally • Regularly • Always
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Response guidance	<u>Context:</u>
	
	• The assessor should seek to determine if the client is unable to identify the time, day, date or year.
	
	<u>Consider and record:</u>
	
	• If the client seems unable to identify the time, day, date or year.
	• Use the below definitions to assist with the response.
	  ○ **Unable to determine:** it is unclear if the client has trouble or the assessor has received conflicting information.
	  ○ **Never:** the client is never displaying signs of disorientation.
	  ○ **Occasionally:** the client displays signs of disorientation on a few occasions.
	  ○ **Regularly:** the client is regularly displaying signs of disorientation (often).
	  ○ **Always:** the client is always displaying signs of disorientation.
	
	<u>Prompts and/or observations:</u>
	
	• Do you sometimes find it difficult to work out the time?
	• Do you sometimes find it difficult to work out the day?
	• Do you sometimes find it difficult to determine the date?
	• Do you sometimes find it difficult to remember the year?

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	• How often do you find it difficult to remember? Support resources: • Disorientation - symptoms, treatments and causes | healthdirect

Disorientation – place

Question: Disorientation	place
Response options	• Unable to determine • Never • Occasionally • Regularly • Always
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Response guidance	Context:
	
	• The assessor should seek to determine if the client is unable to identify where they live or where they are currently placed.
	
	Consider and record:
	
	• If the client is unable to identify where they live or where they are currently placed.
	• Use the below definitions to assist with the response.
	  ○ **Unable to determine:** it is unclear if the client has trouble or the assessor has received conflicting information.
	  ○ **Never:** the client is never displaying signs of disorientation.
	  ○ **Occasionally:** the client displays signs of disorientation on a few occasions.
	  ○ **Regularly:** the client is regularly displaying signs of disorientation (often).

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	○ **Always:** the client is always displaying signs of disorientation. Prompts and/or observations: • Do you sometimes find it difficult to remember where you are? Support resources: • Disorientation - symptoms, treatments and causes | healthdirect

Disorientation – people

Question: Disorientation people	
Response options	• Unable to determine • Never • Occasionally • Regularly • Always
Question rules	This question will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No
Response guidance	Context: • The assessor should seek to determine if the client is unable to identify person(s) such as family or friends. Consider and record: • If the client is unable to identify person(s) such as family or friends. • Use the below definitions to assist with the response. ○ **Unable to determine:** it is unclear if the client has trouble or the assessor has received conflicting information.

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	○ **Never:** the client is never displaying signs of disorientation. ○ **Occasionally:** the client displays signs of disorientation on a few occasions. ○ **Regularly:** the client is regularly displaying signs of disorientation (often). ○ **Always:** the client is always displaying signs of disorientation. Prompts and/or observations: • Do you sometimes find it difficult to remember those around you? • Have you ever had any challenges identifying a friend? • Have you ever had any challenges identified a family member? Support resources: • Disorientation - symptoms, treatments and causes | healthdirect

Assessor notes on cognition

Question: Assessors notes	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	Yes: • This response will pre-populate in the client's support plan (assessment summary)
Response guidance	Context: • This is to provide a holistic summary about the client's cognition. Consider and record: • If the client has confirmed dementia diagnosis. • Key findings from any cognition-focused validated tools administered, if answered. • Key finings the extended cognitive assessment, if answered.

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Question: Assessors notes	
	• Any concerns or issues raised by the client. Prompts and/or observations: • Is there anything else you would like to talk about on your memory and your ability to remember things?

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Behaviour section

The purpose of the behaviour section of the IAT is to identify if there are any behavioural or personality matters that warrant further consideration, and to follow up any raised matters if they are flagged.

Experience feeling aggression, agitated or found wandering

Question: Does the client experience feeling aggression, agitated or have found themselves wandering?	
Response options	• Yes • No
Question rules	This question will be presented to all assessors.
Pre-populated information	No

Response guidance	<u>Context:</u>
	• The assessor should identify if the client experiences feelings of aggression, agitation or have found to be wandering.
	• This question is being asked to determine if additional questions on behaviour should be covered in the assessment.
	
	<u>Consider and record:</u>
	• If the client experiences feelings of aggression, agitation or have found to be wandering.
	• Below are definitions that may assist with the response.
	  ○ **Aggression:** yells, screams, threatens, hits, scratches, bites, pushes, shoves, throws things or uses weapons.
	  ○ **Agitation**: extreme emotional disturbance.
	  ○ **Wandering**: moving about without a definite destination or purpose.
	
	<u>Prompts and/or observations:</u>
	• Do you often find yourself getting angry or agitated?
	• Do you often feel agitated or are quick to anger?

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Question: Does the client experience feeling aggression, agitated or have found themselves wandering?	
	• When you're angry do you ever feel like yelling, screaming scratching, biting, shoving, or throwing things? • Have you noticed any wondering without having a definition destination or purpose? • Have you noticed any change in your behaviour? Do you experience moments of anger or agitation? • Have you found yourself in a location you did not intend to wander to?

Changes in personality

Question: Are there any reported changes in the client's personality?	
Response options	• Yes • No
Question rules	**Threshold questions** are mandatory to complete. If the client answers 'yes' the Extended Behaviour Assessment must be completed. This question will be presented to all assessors.
Pre-populated information	No
Response guidance	<u>Context:</u> • The assessor should identify if there are any reported changes in the client's personality. • This question is being asked to determine if additional questions on behaviour should be covered in the assessment. <u>Consider and record:</u> • If there are any reported changes in the client's personality. <u>Prompts and/or observations:</u> • To get an understanding of reported changes, it may be appropriate to sensitively discuss this question with any support person included in the assessment.

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Question: Are there any reported changes in the client's personality?	
	• Have you recently noticed any slight changes to your personality? • Have you found that you've acted out of character recently? • Have family or friends mentioned a change in your character recently?

Extended behaviour assessment

Aggressive behaviour – verbal

Question: Aggressive Behaviour Verbal	
Response options	• Unable to determine • Never • Occasionally • Regularly • Always
Question rules	**Additional question** presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Response guidance	Context:
	
	• The assessor should identify if the client displays an aggressive verbal behaviour.
	• Aggressive verbal behaviour is when someone yells, screams and/or threatens.
	
	Consider and record:
	
	• If the client displays an aggressive verbal behaviour.
	• Use the below definitions to assist with the response.
	  ○ **Unable to determine:** it is unclear if the client displays aggressive verbal behaviour or the assessor has received conflicting information.
	  ○ **Never:** the client is never displaying at aggressive verbal behaviour

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Question: Aggressive Behaviour Verbal	
	○ **Occasionally:** the client displays aggressive verbal behaviour on a few occasions. ○ **Regularly:** the client is regularly displaying at aggressive verbal behaviour (often). ○ **Always:** the client is always displaying at aggressive verbal behaviour. <u>Prompts and/or observations:</u> • Consider the client's mannerism throughout the assessment, and conduct with those around them. • Do you sometimes get frustrated easily? • Do you ever vocalise your frustrations? • Do you sometimes speak loudly or in a way that someone else might find uncomfortable?

Aggressive behaviour – physical

Question: Aggressive Behaviour Physical	
Response options	• Unable to determine • Never • Occasionally • Regularly • Always
Question rules	**Additional question** presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No
Response guidance	<u>Context:</u> • The assessor should seek to understand if the client displays aggressive physical behaviour. • Aggressive physical behaviour is when someone hits, scratches, bites, pushes, shoves, throws things or uses weapons. <u>Consider and record:</u>

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Question: Aggressive Behaviour Physical	

	• If the client displays an aggressive physical behaviour.
	• Use the below definitions to assist with the response.
	  ○ **Unable to determine:** it is unclear if the client displays aggressive physical behaviour or the assessor has received conflicting information.
	  ○ **Never:** the client is never displaying at aggressive physical behaviour
	  ○ **Occasionally:** the client displays aggressive physical behaviour on a few occasions.
	  ○ **Regularly:** the client is regularly displaying at aggressive physical behaviour (often).
	  ○ **Always:** the client is always displaying at aggressive physical behaviour.
	
	<u>Prompts and/or observations:</u>
	
	• Consider the client's mannerism throughout the assessment, and conduct with those around them.
	• Do you sometimes get frustrated easily?
	• What do you do when you get frustrated?
	• Do you ever lose your cool with those around you?
	• How do you lose your cool?

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Resistive behaviour

Question: Resistive behaviour	
Response options	• Unable to determine • Never • Occasionally • Regularly • Always
Question rules	**Additional question** presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No
Response guidance	<u>Context:</u>

Question: Resistive behaviour	

	• The assessor should seek to understand if the client resists, opposes and/or withstands help or caregiving tasks from those around them such as taking medication, eating or self-feeding.
	
	<u>Consider and record:</u>
	
	• If the client displays a resistive behaviour.
	• Use the below definitions to assist with the response.
	  ○ **Unable to determine:** it is unclear if the client displays resistive behaviour or the assessor has received conflicting information.
	  ○ **Never:** the client is never displaying at resistive behaviour
	  ○ **Occasionally:** the client displays resistive behaviour on a few occasions.
	  ○ **Regularly:** the client is regularly displaying at resistive behaviour (often).
	  ○ **Always:** the client is always displaying at resistive behaviour.
	
	<u>Prompts and/or observations:</u>
	
	• Have you recently denied help from family, friends or service providers with caregiving tasks such as taking medication, eating or self-feeding?
	• How often do you resist them from helping you?

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Agitation

Question: Agitation	
Response options	• Unable to determine • Never • Occasionally • Regularly • Always
Question rules	**Additional question** presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.

Question: Agitation	
Pre-populated information	No

Response guidance	Context:
	
	• The assessor should identify if the client gets agitated.
	• Agitation is where a person experiences extreme emotional disturbance.
	
	Consider and record:
	
	• If the client gets agitated.
	• Use the below definitions to assist with the response.
	  ○ **Unable to determine:** it is unclear if the client displays signs of agitation or the assessor has received conflicting information.
	  ○ **Never:** the client is never displaying signs of agitation.
	  ○ **Occasionally:** the client displays signs of agitation on a few occasions.
	  ○ **Regularly:** the client is regularly displaying signs of agitation (often).
	  ○ **Always:** the client is always displaying signs of agitation.
	
	Prompts and/or observations:
	
	• Do you sometimes get easily agitated?
	• What gets you agitated?
	• How often do you feel agitated?
	• How do you manage things when you are feeling agitated?
	• How long do you feel agitated for?

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Hallucinations/delusions

Question: Hallucinations/delusions	
Response options	• Unable to determine • Never • Occasionally • Regularly • Always
Question rules	**Additional question** presented to all assessors.

Question: Hallucinations/delusions	
	If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No
Response guidance	Context: • The assessor should identify if the client experiences hallucinations or delusions. • Hallucinations can occur in any sensory modality: auditory, visual, olfactory, gustatory and tactile. • Delusions are false or erroneous beliefs that usually involve a misinterpretation of perceptions or experiences. Consider and record: • If the client experiences hallucinations or delusions. • Use the below definitions to assist with the response. ○ **Unable to determine:** it is unclear if the client displays signs of hallucination and/or delusion or the assessor has received conflicting information. ○ **Never:** the client is never displaying signs of hallucination and/or delusion. ○ **Occasionally:** the client displays signs of hallucination and/or delusion on a few occasions. ○ **Regularly:** the client is regularly displaying signs of hallucination and/or delusion (often). ○ **Always:** the client is always displaying signs of agitation. Prompts and/or observations: • Do you sometimes have disordered thinking? • Do people around you sometimes disagree with what is happening around you?

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Wandering

Question: Wandering	
Response options	• Unable to determine • Never

Question: Wandering	
	• Occasionally • Regularly • Always
Question rules	**Additional question** presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Response guidance	<u>Context:</u>
	
	• The assessor should identify if the client displays wandering behaviour.
	• Wandering behaviour is moving around without a definitive destination or purpose.
	
	<u>Consider and record:</u>
	
	• If the client displays wandering behaviour.
	• Use the below definitions to assist with the response.
	  ○ **Unable to determine:** it is unclear if the client displays signs of wandering behaviour or the assessor has received conflicting information.
	  ○ **Never:** the client is never displaying signs of hallucination and/or delusion.
	  ○ **Occasionally:** the client displays signs of wandering behaviour on a few occasions.
	  ○ **Regularly:** the client is regularly displaying signs of wandering behaviour (often).
	  ○ **Always:** the client is always displaying signs of wandering behaviour.
	
	<u>Prompts and/or observations:</u>
	
	• Do you sometimes go for walks?
	• What do you do when going for walks? Is it for a purpose?
	• Do you sometimes get confused when you are going for a walk?

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Assessor notes on behaviours

Question: Assessors notes on behaviours	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	Yes: • This response will pre-populate in the client's support plan (assessment summary)
Response guidance	Context: • This is to provide a holistic summary about the client's behaviours. Consider and record: • If the client experiences feelings of aggression, agitation or is found wandering. • If the client experiences any reported changes in personality. • Key finings the extended behaviour assessment, if answered. • Any concerns or issues raised by the client. Prompts and/or observations: • Is there anything else you would like to talk about on the behaviour questions we discussed?

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Psychological section

The purpose of the psychological section of the IAT is to identify if there are any potential anxiety or depression indicators that may be experienced by the client, and to follow up any raised matters if they are flagged.

Validated tool: Patient Health Questionnaire-4 (PHQ-4)

Context:

The purpose of the **PHQ-4** is to allow for ultra-brief and accurate measurement of core symptoms/signs of depression and anxiety by combining the two-item measure (PHQ–2), consisting of core criteria for depression, as well as a two-item measure for anxiety (GAD–2), both of which have independently been shown to be good brief screening tools.

Instructions and interpretation:

Assessors should use their judgement on how to ask questions and requests related to this validated tool. Assessors will need to consider the circumstances and background of the client when following the validated tool questions, and ensure they are:

> Being mindful of appropriate and understandable language;
> adapting questions to the context that is appropriate; and
> Making alternative prompts or suggestions where needed.

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The total PHQ–4 score complements the subscale scores as an overall measure of symptom burden, as well as functional impairment and disability.

The following scores are applied for each response:

- 0 = No, not at all
- 1 = Several days
- 2 = More than half of the days
- 3= Nearly every day

An elevated PHQ–4 score is not diagnostic, but is, instead, an indicator for further inquiry to establish the presence or absence of a clinical disorder warranting treatment. If the score for any question is three points, the advanced assessment validated tool and Geriatric Depression Scale validated tool will be flagged for completion.

Additional information and training resources:

Please refer to the below guidance material for information on completing this validated tool and appropriately asking questions.

- Some guidance on PHQ-4 is available at: Anxiety & Depression (PHQ-4) | The WELL Office – McGill University

Feeling nervous, anxious or on edge in the last two weeks

Question: PHQ4: 1. Feeling nervous, anxious or on edge the last 2 weeks?	
Response options	• No, not at all (0) • Several days (1) • More than half of the days (2) • Nearly every day (3)
Question rules	**Threshold questions** are mandatory to complete. If clients yield a score of more than 4 for the PHQ-4 questions, the Advanced Psychological Assessment section should be completed. This question will be presented to all assessors.
Pre-populated information	No

Not being able to stop or control worrying in last two weeks

Question: PHQ4: 2. Not being able to stop or control worrying last 2 weeks?	
Response options	• No, not at all (0) • Several days (1) • More than half of the days (2) • Nearly every day (3)
Question rules	**Threshold questions** are mandatory to complete. If clients yield a score of more than 4 for the PHQ-4 questions, the Advanced Psychological Assessment section should be completed. This question will be presented to all assessors.
Pre-populated information	No

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Little interest or pleasure in doing things in last two weeks

Question: PHQ4: 3. Little interest or pleasure in doing things last 2 weeks?	
Response options	• No, not at all (0) • Several days (1) • More than half of the days (2) • Nearly every day (3)

Question: PHQ4: 3. Little interest or pleasure in doing things last 2 weeks?	
Question rules	**Threshold questions** are mandatory to complete. If clients yield a score of more than 4 for the PHQ-4 questions, the Advanced Psychological Assessment section should be completed. This question will be presented to all assessors.
Pre-populated information	No

Feeling down, depressed or hopeless in last two weeks

Question: PHQ4: 4. Feeling down, depressed or hopeless last 2 weeks?	
Response options	• No, not at all (0) • Several days (1) • More than half of the days (2) • Nearly every day (3)
Question rules	**Threshold questions** are mandatory to complete. If clients yield a score of more than 4 for the PHQ-4 questions, the Advanced Psychological Assessment section should be completed. This question will be presented to all assessors.
Pre-populated information	No

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Advanced psychological assessment

Stressful events over the past three months

Question: Has the client experienced stressful events over the past three months (e.g. bereavement, severe illness or injury of self/family/friend, separation from family/partner, major financial loss or being a victim of a crime)	
Response options	• Yes • No
Question rules	**Additional question** that will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Question: Has the client experienced stressful events over the past three months (e.g. bereavement, severe illness or injury of self/family/friend, separation from family/partner, major financial loss or being a victim of a crime)	

Response guidance	Context:
	
	• The assessor should identify if the client has experienced any stressful events of note over the past few months.
	• A stressful event can be described as a situation that can trigger a cascade of stress hormones that produce physiological changes.
	• Everyone experiences stress differently, and what may be a stressful event for one person might not be the same for another (or vice versa).
	
	Consider and record:
	
	• If the client has experienced any stressful events of note over the past few months.
	• Examples of stressful events include:
	  ○ Bereavement
	  ○ Severe illness
	  ○ Injury of self
	  ○ Injury of a family member or friend
	  ○ Separation from family or a partner
	  ○ Major financial loss
	  ○ Being a victim of a crime
	
	Prompts and/or observations:
	
	• Have you had any tough events over the past few months?
	• Have you had any unfortunate circumstances recently?
	• Has anything been causing you stress lately?
	• Are you finding anything difficult to manage at the moment?
	
	Recommendations:
	
	• Referral to a GP/psychologist.
	
	Support resources:
	
	• Stress - normal versus problematic, fight or flight | healthdirect

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Details of stressful events over the past three months

Question: Please describe	
Response options	• Textbox for written response
Question rules	**Additional question** that will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Response guidance	<u>Context:</u>
	
	• The assessor should summarise details of any stressful events of note that the client has experienced over the past few months.
	• A stressful event can be described as a situation that can trigger a cascade of stress hormones that produce physiological changes.
	• Everyone experiences stress differently, and what may be a stressful event for one person might not be the same for another (or vice versa).
	
	<u>Consider and record:</u>
	
	• Details of any stressful events of note over the past few months.
	  ○ A summary of the event
	  ○ Types of stress that the client is experiencing
	  ○ If the stress is also related to other events
	  ○ If the stress increased or decreased over time
	  ○ What current arrangements are in in place to support the client
	  ○ The client's outlook for the future
	• Examples of stressful events include:
	  ○ Bereavement
	  ○ Severe illness
	  ○ Injury of self
	  ○ Injury of a family member or friend
	  ○ Separation from family or a partner
	  ○ Major financial loss
	  ○ Being a victim of a crime

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Question: Please describe	
	Prompts and/or observations: • Do you mind sharing some more details on your stressful event? How long ago was it? • How are you coping? • Do you have some support? • How do you feel about the future? Do you think things will get better? • Have there been any other similar stressful events? Recommendations: • Referral to a GP/psychologist. Support resources: • Stress - normal versus problematic, fight or flight | healthdirect

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Disturbed sleep or insomnia

Question: Disturbed sleep/insomnia	
Response options	• Unable to determine • Never • Occasionally • Regularly • Always
Question rules	**Additional question** that will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No
Response guidance	Context: • The assessor should identify if the client experiences disturbed sleep and/or insomnia. • Disturbed sleep involves frequent awakenings during the night, disrupting the sleep cycle. People experiencing

Question: Disturbed sleep/insomnia	
	disturbed sleep may wake up one or more times during the night, either briefly or for an extended period. • Insomnia refers to disruptions in sleep patterns, making it challenging to fall asleep, stay asleep, or achieve restorative rest. Insomnia is a sleep disorder that can significantly impact a person's wellbeing. <u>Consider and record:</u> • If the client experiences disturbed sleep and/or insomnia. • Use the below definitions to assist with the response. ○ **Unable to determine:** it is unclear if the client experiences disturbed sleep and/or insomnia or the assessor has received conflicting information. ○ **Never:** the client is never experiencing disturbed sleep and/or insomnia. ○ **Occasionally:** the client experiences disturbed sleep and/or insomnia on a few occasions. ○ **Regularly:** the client is regularly experiencing disturbed sleep and/or insomnia (often). ○ **Always:** the client is always experiencing disturbed sleep and/or insomnia. <u>Prompts and/or observations:</u> • What is your sleep like? • Do you find it easy to get to sleep? • When you fall asleep, do you typically stay asleep? • Do you feel well rested after sleep? • Do you often wake up during the night? • Do you have challenges getting back to sleep? • Have you ever seen a health professional about sleep? <u>Recommendations:</u> • Referral to a GP/health professional to assist with sleep. <u>Support resources:</u> • Sleep - stages, tips, disorders, apnoea | healthdirect • How to get better sleep, according to science | healthdirect • Safe use of sleeping pills | healthdirect • Insomnia Program | healthdirect

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Question: Disturbed sleep/insomnia	

Anxiety

Question: Anxiety	
Response options	• Unable to determine • Never • Occasionally • Regularly • Always
Question rules	**Additional question** that will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Response guidance	<u>Context:</u>
	
	• The assessor should seek to identify if the client experiences feelings of anxiety.
	• Anxiety is a common experience that many people encounter. It involves feelings of apprehension, worry, and unease.
	• Normal worry can be motivating and helpful. However, in some individuals, anxious feelings persist and become disproportionate to the situation.
	• People with anxiety disorders experience ongoing fears that cause distress and hinder them from doing things they want or need to do.
	
	<u>Consider and record:</u>
	
	• If the client experiences feelings of anxiety.
	• Use the below definitions to assist with the response.
	  ○ **Unable to determine:** it is unclear if the client experiences anxiety or the assessor has received conflicting information.
	  ○ **Never:** the client is never experiencing anxiety.
	  ○ **Occasionally:** the client experiences anxiety on a few occasions or only in a few circumstances.

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Question: Anxiety	
	○ **Regularly:** the client is regularly experiencing anxiety in many circumstances and situations (often). ○ **Always:** the client is always experiencing anxiety. Prompts and/or observations: • Do you sometimes feel uncomfortable in certain situations or circumstances? • How are you feeling when you are uncomfortable? What are you experiencing? • Do these experiences ever make you feel fearful? • Do you sometimes experience a racing heart and/or sweaty in these situations? • Do you ever feel a shortness of breath and/or dizziness in these situations? • How common are these situations? Recommendations: • Referral to a GP/psychologist. Support resources: • Anxiety - symptoms, treatment and causes | healthdirect

Symptoms of depression

Question: Symptoms of depression	
Response options	• Unable to determine • Never • Occasionally • Regularly • Always
Question rules	**Additional question** that will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

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Question: Symptoms of depression	

Response guidance	Context:
	
	• The assessor should seek to identify if the client experiences symptoms of depression.
	• Depression is a mood disorder characterized by persistent feelings of sadness, emptiness, and loss of joy. Depression impacts how you feel, think and behave.
	
	Consider and record:
	
	• If the client experiences symptoms of depression.
	• Use the below definitions to assist with the response.
	  ○ **Unable to determine:** it is unclear if the client experiences symptoms of depression or the assessor has received conflicting information.
	  ○ **Never:** the client is never experiencing symptoms of depression.
	  ○ **Occasionally:** the client experiences symptoms of depression on a few occasions or only in a few circumstances.
	  ○ **Regularly:** the client is regularly experiencing symptoms of depression in many circumstances and situations (often).
	  ○ **Always:** the client is always experiencing symptoms of depression.
	
	Prompts and/or observations:
	
	• Consider the below symptoms of depression as observations and prompts for discussion with the client:
	  ○ Emotional symptoms:
	  ▪ Continuous low mood: feeling persistently sad or emotionally down.
	  ▪ Hopelessness and helplessness: a sense of despair and lack of control.
	  ▪ Low self-esteem: feeling inadequate or unworthy.
	  ▪ Tearfulness: frequent crying spells.
	  ▪ Irritability and frustration: becoming easily annoyed or agitated.
	  ▪ Lack of confidence: feeling insecure.
	  ▪ Unhappiness or disappointment: a pervasive feeling of misery.
	  ○ Behavioural signs:

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Question: Symptoms of depression	
	▪ Social withdrawal: avoiding social interactions with family and friends. ▪ Reduced productivity: struggling to complete tasks ▪ Loss of interest: no longer finding pleasure in activities you used to enjoy. ▪ Changes in sleep patterns: insomnia or excessive sleep. ▪ Appetite changes: significant weight loss or gain. ▪ Reliance on alcohol or sedatives: using substances to cope. ○ Negative thoughts: ▪ Self-critical: believing you are a failure or worthless. ▪ Pessimism: seeing everything in a negative light. ▪ Suicidal thoughts: in severe cases, contemplating self-harm or suicide. ○ Physical Symptoms: ▪ Fatigue: feeling tired all the time. ▪ Headaches and muscle pains: physical discomfort. ▪ Stomach discomfort: butterflies, pain, or churning sensations. ▪ Sleep problems: insomnia or disrupted sleep. ▪ Appetite changes: loss of appetite or overeating. ▪ Significant weight fluctuations: unintended weight loss or gain. <u>Recommendations:</u> • Referral to a GP/psychologist. <u>Support resources:</u> • Depression - symptoms, types, treatment | healthdirect

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Apathy

Question: Apathy	
Response options	• Unable to determine • Never • Occasionally • Regularly • Always
Question rules	**Additional question** that will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Response guidance	<u>Context:</u>
	
	• The assessor should seek to identify if the client experiences apathy.
	• Apathy can be described as an absence of feeling or emotion. People experiencing apathy might stop caring about everyday tasks, hobbies, or personal interests, or showing interest in personal relationships.
	
	<u>Consider and record:</u>
	
	• If the client experiences apathy.
	• Use the below definitions to assist with the response.
	  ○ **Unable to determine:** it is unclear if the client experiences apathy or the assessor has received conflicting information.
	  ○ **Never:** the client is never experiencing apathy.
	  ○ **Occasionally:** the client experiences apathy on a few occasions or only in a few circumstances.
	  ○ **Regularly:** the client is regularly experiencing apathy in many circumstances and situations (often).
	  ○ **Always:** the client is always experiencing apathy.
	
	<u>Prompts and/or observations:</u>
	
	• Do you find fulfilment in your hobbies and personal interests?

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Question: Apathy	
	• Do you sometimes find it difficult to show interest in your personal relationships? • Do you sometimes feel indifferent to things you used to care about? • Do you think you feel lots of emotions or do you experience very little emotion? <u>Recommendations:</u> • Referral to a GP/psychologist.

Loneliness

Question: Loneliness	
Response options	• Unable to determine • Never • Occasionally • Regularly • Always
Question rules	**Additional question** that will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No
Response guidance	<u>Context:</u> • The assessor should seek to identify if the client experiences loneliness. • Loneliness is an unpleasant emotional response to perceived isolation. • Note: loneliness is not the same as solitude. Loneliness is the ache of wanting greater social connection than a person currently experiences. It is the gap between a person's desire for companionship and a person's actual experiences of it. <u>Consider and record:</u> • If the client experiences loneliness.

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Question: Loneliness	

	• Use the below definitions to assist with the response.
	  ○ **Unable to determine:** it is unclear if the client experiences loneliness or the assessor has received conflicting information.
	  ○ **Never:** the client is never experiencing loneliness.
	  ○ **Occasionally:** the client experiences loneliness on a few occasions or only in a few circumstances.
	  ○ **Regularly:** the client is regularly experiencing loneliness in many circumstances and situations (often).
	  ○ **Always:** the client is always experiencing loneliness.
	
	Prompts and/or observations:
	
	• Do you often spend time alone?
	• Do you like spending time alone?
	• Do you have a desire for greater social connection than you currently have?
	
	Recommendations:
	
	• Recommendations for social support or related activities.
	
	Support resources:
	
	• Loneliness and isolation | healthdirect

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Social isolation

Question: Where a client lacks engagement with others, has a minimal number of social contacts and is deficient in fulfilling quality relationships.	
Response options	• Unable to determine • Never • Occasionally • Regularly • Always
Question rules	**Additional question** that will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.

Question: Where a client lacks engagement with others, has a minimal number of social contacts and is deficient in fulfilling quality relationships.	
Pre-populated information	No

Response guidance	Context:
	
	• The assessor should seek to identify if the client lacks engagement with others.
	• Social isolation is when an individual experiences complete or near-complete lack of contact with society. It means having few social relationships or roles and infrequent social interactions.
	• Social isolation differs from loneliness. Social isolation is the person's actual social situation, whereas loneliness is the person's subjective feeling on connection to people and desires for social relationships.
	
	Consider and record:
	
	• If the client lacks engagement with others, has a minimal number of social contacts and is deficient in fulfilling quality relationships.
	• Use the below definitions to assist with the response.
	  ○ **Unable to determine:** it is unclear if the client experiences social isolation or the assessor has received conflicting information.
	  ○ **Never:** the client is never experiencing social isolation.
	  ○ **Occasionally:** the client experiences social isolation on a few occasions or only in a few circumstances.
	  ○ **Regularly:** the client is regularly experiencing social isolation in many circumstances and situations (often).
	  ○ **Always:** the client is always experiencing social isolation.
	
	Prompts and/or observations:
	
	• Do you keep in touch with many friends and family?
	• How regularly do you keep in touch with them?
	• Are you well connected socially?
	
	Support resources:

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Question: Where a client lacks engagement with others, has a minimal number of social contacts and is deficient in fulfilling quality relationships.	
	• Loneliness and isolation | healthdirect

Consent to complete Geriatric Depression Scale

Question: Do you want to complete the Geriatric Depression Scale?	
Response options	• Yes • No
Question rules	**Threshold questions** are mandatory to complete. The Geriatric Depression Scale will be available if the client gives consent to complete it. This question will be presented to all assessors.
Pre-populated information	No
Response guidance	Context: • An assessor should use the GDS with First Nations clients only when it would be culturally appropriate to do so, and the assessor has appropriate cultural safety training and experience. • The questions in the GDS may be sensitive for the client, so it is important that an assessors is cautious of these potentially sensitivities when administrating this validated tool. • Please review the MAClearning element **Validated Assessment Tools in Practice** for further guidance on how and when to administer this validated tool with a client at an assessment. Consider and record: • The assessor's judgement on the appropriateness of administering the GDS with the client at assessment. • If the client is able and willing to complete the GDS at assessment.

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Validated tool: Geriatric Depression Scale

Context:

The Geriatric Depression Scale (GDS) (15 point version) is a depression assessment tool specifically designed for older people. The GDS can be filled out by the client or administered by an interviewer. It comprises 15 questions about how the client has felt over the past week. Questions require yes/no answers. Some items in the GDS may not be appropriate at all times for all cultural groups.

Instructions and interpretation:

Higher scores indicate more depressive symptoms are present. A score of 6 or more suggests the presence of depression which indicates further medical/psychiatric assessment is required. A score of 11 or more usually always indicates depression with higher scores indicating more severe depression.

It has been reported that a number of items in the GDS contain Western value judgments of optimism, happiness, stoicism and looking forward. These include:

Do you prefer to stay at home, rather than going out and doing new things?
Do you think it is wonderful to be alive now?
Do you worry a lot about the past?
Do you think that most people are better off than you are?

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Additional information and training resources:

Please refer to the below guidance material for information on completing this validated tool and appropriately asking questions.

- Please review the MAClearning element **Validated Assessment Tools in Practice** for further guidance on how and when to administer this validated tool with a client at an assessment.

Are you basically satisfied with your life?

Question: Are you basically satisfied with your life?	
Response options	• Yes • No
Question rules	**Additional question** that will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.

Question: Are you basically satisfied with your life?	
Pre-populated information	No

Have you dropped many of your activities or interests?

Question: Have you dropped many of your activities or interests?	
Response options	• Yes • No
Question rules	**Additional question** that will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Do you feel that your life is empty?

Question: Do you feel that your life is empty?	
Response options	• Yes • No
Question rules	**Additional question** that will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures
Pre-populated information	No

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Do you often get bored?

Question: Do you often get bored?	
Response options	• Yes • No
Question rules	**Additional question** that will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.

Question: Do you often get bored?	
Pre-populated information	No

Are you in good spirits most of the time?

Question: Are you in good spirits most of the time?	
Response options	• Yes • No
Question rules	**Additional question** that will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

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Are you afraid that something bad is going to happen to you?

Question: Are you afraid that something bad is going to happen to you?	
Response options	• Yes • No
Question rules	**Additional question** that will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Do you feel happy most of the time?

Question: Do you feel happy most of the time?	
Response options	• Yes • No
Question rules	**Additional question** that will be presented to all assessors.

Question: Do you feel happy most of the time?	
	If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Do you feel helpless?

Question: Do you feel helpless?	
Response options	• Yes • No
Question rules	**Additional question** that will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Do you prefer to stay at home, rather than go out and do things?

Question: Do you prefer to stay at home, rather than go out and do things?	
Response options	• Yes • No
Question rules	**Additional question** that will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Do you feel that you have more problems with memory than most?

Question: Do you feel that you have more problems with memory than most?	
Response options	• Yes • No

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Question: Do you feel that you have more problems with memory than most?	
Question rules	**Additional question** that will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Do you think it is wonderful to be alive now?

Question: Do you think it is wonderful to be alive now?	
Response options	• Yes • No
Question rules	**Additional question** that will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

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Do you feel pretty worthless the way you are now?

Question: Do you feel pretty worthless the way you are now?	
Response options	• Yes • No
Question rules	**Additional question** that will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Do you feel full of energy?

Question: Do you feel full of energy?	
Response options	• Yes • No
Question rules	**Additional question** that will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Do you feel that your situation is hopeless?

Question: Do you feel that your situation is hopeless?	
Response options	• Yes • No
Question rules	**Additional question** that will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

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Do you think that most people are better off then you are?

Question: Do you think that most people are better off then you are?	
Response options	• Yes • No
Question rules	**Additional question** that will be presented to all assessors. If the question is prompted for a non-clinical assessor, they must complete in accordance with their organisation's clinical governance framework and standard operating procedures.
Pre-populated information	No

Assessor psychological observations

Question: Assessor psychological observations	
Response options	Textbox for written response
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • This is to provide a holistically summary about the client's psychological experience. Consider and record: • Key findings from any validated tools administered. • Key finings the extended psychological assessment, if answered. • Any concerns or issues raised by the client. Prompts and/or observations: • Is there anything else you would like to talk about on the behaviour questions we discussed?

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Home and personal safety section

The purpose of the home and personal safety section of the IAT is to consider the client's safety in their usual accommodation setting by seeking information on their home environment, home safety, home and garden maintenance, and personal safety.

Home and garden assessment

Question: Access the home and garden and ask the client about: • **Any difficulty/unsteadiness/need to hold onto doors or walls when on steps/stairs or getting in and out of shower** • **Any trouble getting on and off toilet** • **Any trouble navigating the house at night** • **Any near slips or trips on surfaces**	
Response options	• Home and garden are safe • Minimal environmental hazards • Moderate environmental hazards requiring modification • Extremely unsafe environment
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Response guidance	Context:
	• The assessor should assess any hazards in the client's home and garden.
	• A hazard is a source or situation with the potential for harm in terms of:
	  ○ Human injury or ill-health;
	  ○ Damage to property; and/or
	  ○ Damage to the environment.
	
	Consider and record:
	• If there are any hazard in the client's home and garden.
	• Consider the below potential hazards or previous issues experienced.
	  ○ Any difficulty/unsteadiness/need to hold onto doors or walls when on steps/stairs or getting in and out of shower.
	  ○ Any trouble getting on and off toilet.
	  ○ Any trouble navigating the house at night.
	  ○ Any near slips or trips on surfaces.

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Question: Access the home and garden and ask the client about: • Any difficulty/unsteadiness/need to hold onto doors or walls when on steps/stairs or getting in and out of shower • Any trouble getting on and off toilet • Any trouble navigating the house at night • Any near slips or trips on surfaces	
	• Use the below definitions to assist with the response. ○ **Home and garden are safe:** no hazards or concerns. ○ **Minimal environmental hazards:** minor hazards or concerns that are easy to address with minor changes. ○ **Moderate environmental hazards requiring modification:** moderate hazards or concerns which require modifications to the house or garden to create a safe environment. ○ **Extremely unsafe environment:** major hazards or concerns which cannot realistically be addressed through any modifications. <u>Prompts and/or observations:</u> • Is there anything around the house or garden that causes you problems? • Have you had any incidents around the house? • Do you feel that you can safely travel around your house and garden? • Do you have any issues at nighttime travelling around your house? • Do you have any slippery surfaces?

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Home and garden general observations

Question: General observations of the home environment	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	<u>Context:</u> • The assessor should make some general observations about the client's home and garden.

Question: General observations of the home environment	

	• This refers to the general observations an assessor can make of the client's home environment.
	
	<u>Consider and record:</u>
	
	• General observations about the client's home and garden.
	
	<u>Prompts and/or observations:</u>
	
	• During an assessment, observation provides an opportunity to note a client's home environment. An assessor can make observations about the client's safety in their home, including how they:
	  ○ Negotiate stairs (internal and external) and uneven flooring
	  ○ Access cupboards, the garden, clothesline, letterbox, driveway
	  ○ Move freely around the home.
	• Some topics to consider as part of prompts with the client:
	  ○ How the client is able to negotiate internal and/or external stairs and uneven/different floor surfaces?
	  ○ Whether the client can access cupboards, the garden, the clothesline, the letterbox, the driveway?
	  ○ Whether mats, electrical cords and/or clutter is present?
	  ○ If the client's garden is neat and tidy or if the garden and/or lawns are overgrown?
	  ○ If light globes are not working inside and/or outside the home?
	  ○ If the home receives inadequate natural lighting?
	  ○ If the home is in need of general maintenance and repairs?
	  ○ If there is clutter present and whether a client is able to move freely around the home?
	  ○ Timeframes for issues identified.

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Home safety equipment

Question: Home safety equipment client has	
Response options	• Smoke alarm(s) • Personal alarm • Personal emergency plan

Question: Home safety equipment client has	
	• Other technology
Question rules	**Base question**
Pre-populated information	No

Response guidance	Context:
	
	• The assessor should determine what home safety equipment that the client currently has.
	• Clients need to feel safe in their own homes; and their home has to be safe for them. Safety can be ensured in a number of different ways. Technologies to assist with home safety include:
	• **Smoke alarms**: Smoke alarms are vital in ensuring lives are protected. They are designed to alert residents to smoke or fire, in time to act or evacuate. Smoke alarms should be kept in good working order. Smoke alarm safety tips include:
	  ○ Test it once a month by pressing the test button until the alarm sounds
	  ○ Clean it with a vacuum cleaner every six months to remove dust
	  ○ Change the battery once a year
	  ○ Replace the whole unit every ten years.
	• **Personal alarm:** A personal alarm is a safety device that allows a user to call for assistance in an emergency. It may also be known as a Personal Emergency Response System; Medical Personal Alarm; Personal Alarm Call System; Personal Emergency Response System; Personal Emergency Call System; or an Emergency Pendant.
	• **Personal emergency plans:** Plans that are developed to outline what actions the client would take in the event of fire, heat wave or flood. Clients should be encouraged to develop a personal emergency plan that links them to family, friends, neighbours or local groups that can be actioned in the event of an emergency. The client's personal emergency plan should be developed in collaboration with the people and and/or groups that they intend to utilise in an emergency.
	
	Consider and record:

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Question: Home safety equipment client has	
	• Whether the client has a smoke alarm; personal alarm; personal emergency plan in case of fire, heat wave or flood; or uses other technology to ensure home safety. Prompts and/or observations: • Do you have any concerns about risks or hazards in your home? • Do you wear your personal alarm at all times? What happens if you have a fall or need assistance? • When checking/testing the personal alarm, does the client know how to operate it? Recommendations: • Recommendation/referral to state and territory specific programs that assist older people to install, maintain and/or replace smoke alarms.

Characteristics of client's house

Question: Characteristics of client's house	
Response options	• Single storey no steps inside or outside home • Single storey with some internal or external steps • Multi storey with stairs • Multi storey with stairs and chair lift or elevator in home
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • The assessor should determine the characteristics of the client's home. • This question is asked to identify if the design of the client's house may create difficulties for them with the number of stairs. Consider and record: • The characteristics of the client's home. • If there are any steps inside and outside the house.

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Question: Characteristics of client's house	
	• If the client's house is multiple stories. • If the client's house has a chair lift or elevator in the home. • Select the response option that best fits the characteristics of the client's home. <u>Prompts and/or observations:</u> • Can you describe your house? • How many sets of stairs do you have inside the house? • Do you have stairs outside the house? • Is your house multi-story? • Do you have a chair lift or elevator in your house?

Characteristics of client's garden

Question: Characteristics of client's garden	
Response options	• Mowing and/or gardening (weeding, hedging etc.) required • Mowing only required • Gardening only (weeding, hedging etc) required • No garden
Question rules	**Base question**
Pre-populated information	No
Response guidance	<u>Context:</u> • The assessor should determine the types of tasks required to maintain upkeep in the client's garden. • This question relates to the characteristics of the client's garden, rather than any needs or assistance required. • Please also note there is no correlation between this question and eligibility for related aged care services. <u>Consider and record:</u> • The types of tasks required to maintain upkeep in the client's garden. • Include a note in the assessor notes on home and personal safety if the client is currently receiving gardening services to manage these tasks (either formal/paid or informal/unpaid).

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Question: Characteristics of client's garden	
	Prompts and/or observations: • What tasks need to be undertaken in the garden to maintain upkeep? • To you have grass that needs mowing? • Do you have any gardening needs (wedding, hedging etc.)?

Home and garden maintenance concerns

Question: Home maintenance (including gardening) concerns	
Response options	• Yes • No
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • The assessor should identify whether there are concerns about the client's ability to keep their home in a safe and habitable condition. Consider and record: • If there are any home maintenance and/or garden maintenance concerns. Prompts and/or observations: • How do you feel you are managing within your home? • Do you feel that your home is a manageable size to maintain? • Are there ongoing maintenance costs/repairs that are beginning to concern you? • If the client has a garden, how do you manage your garden and lawns? • (For clients on big properties) Are there any fire breaks that require maintenance?

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Details of home and garden maintenance concerns

Question: Please specify	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • The assessor should summarise details of any concerns about the client's ability to keep their home in a safe and habitable condition. Consider and record: • Activities the client undertakes to maintain their home, and how frequently they undertake these activities. • Any assistance or supervision of another person with basic maintenance and repair of the person's home, garden or yard. • This should cover details on any safety issues. • This should also include advice to flag if the client has any tenancy risks from their home and garden maintenance concerns. Prompts and/or observations: • Can you please share some more details about some of your home and garden maintenance concerns?

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Help for home and garden maintenance

Question: There is help for client's home maintenance	
Response options	• Yes • No
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context:

Question: There is help for client's home maintenance	
	• The assessor should identify if the client receives any assistance with basic maintenance and repair of their home Consider and record: • if the client receives any assistance with basic maintenance and repair of their home, garden or yard. Prompts and/or observations: • How do you manage home maintenance tasks such as changing light globes, checking the smoke alarm, cleaning windows and gutter cleaning? • Do you receive any help?

Details of help for home and garden maintenance

Question: If yes, who helps?	
Response options	• Partner • Mother • Father • Daughter • Son • Daughter in law • Son in law • Other relative • Friend/neighbour • Service provider • Other
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • The assessor should summarise details on any assistance or supervision provided by someone else with basic maintenance and repair of the client's home. Consider and record:

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Question: If yes, who helps?	
	• Who helps the client with home maintenance.

Unstable accommodation

Question: Is the client living in unstable accommodation, such as having short term accommodation, having previous accommodation end, or living in a boarding house without the security of tenure?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	<u>Context:</u> • The assessor should identify if the client is living in unstable accommodation. • Unstable accommodation refers to living arrangements that lack stability, security, or permanence. • Unstable accommodation can include having previous accommodation end, or living in a boarding house without the security of tenure. <u>Consider and record:</u> • If the client is living in unstable accommodation. <u>Prompts and/or observations:</u> • Can you explain your current living situation? • Do you own or have a lease on where you live? • If you have a lease, when does this finish? • Do you have a good relationship with your landlord or real estate agent? Are they helpful when you have concerns?

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Assessor notes on home and personal safety

Question: Home and personal safety assessor notes	
Response options	Textbox for written response
Question rules	**Base question**

Question: Home and personal safety assessor notes	
Pre-populated information	No
Response guidance	Context: • This is to provide a holistically summary about the client's home and personal safety. Consider and record: • Summary of the client's home and garden, and how they are managing any tasks required. • If the client lives in unstable accommodation. Prompts and/or observations: • Is there anything else you would like to talk about on the behaviour questions we discussed?

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Financial or legal section

The purpose of the financial or legal section of the IAT is to understand if the client may have any financial or legal concerns, and to explore any concerns that are raised.

Financial and legal issues

Question: Are there any financial and legal issues?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	<u>Context:</u> • The assessor should identify if the client is experiencing any financial issues. • The assessor should identify if the client is experiencing any legal issues. • A legal issue essentially refers to a matter or dispute that involves the interpretation, application, or violation of laws or regulations. • A financial issue refers to any challenge or problem related to money, budgeting, or financial stability. These issues can vary in severity and impact various aspects of an individual's life. <u>Consider and record:</u> • If the client is experiencing any financial and/or legal issues. <u>Prompts and/or observations:</u> • Do you feel comfortable with managing your finances? • Is there anything about your finances that you find stressful or difficult to manage? • Do you feel well supported with managing your finances? • Do you feel comfortable with managing any legal issues? • Are there any legal issues that you find stressful or difficult to manage?

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Question: Are there any financial and legal issues?	
	• Do you feel well supported with managing your legal affairs? Support resources: • Financial stress and your health | healthdirect

Capability of making own decisions

Question: Is the client capable of making their own decisions?	
Response options	• Yes • No
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • The assessor should identify if the client is capable of making their own financial or legal decisions. Consider and record: • If the client is capable of making their own financial or legal decisions. Prompts and/or observations: • Do you find you need someone to help you with financial or legal decisions?

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Power of attorney

Question: Is there a power of attorney?	
Response options	• Yes • No
Question rules	**Base question**
Pre-populated information	No

Question: Is there a power of attorney?	
Response guidance	Context: • The assessor should identify if the client has a power of attorney. • A Power of Attorney is a legal document that grants a person or trustee organisation the authority to act on a person's behalf. Consider and record: • If the client has a power of attorney. Prompts and/or observations: • Have you made arrangements for someone to act on your behalf if you were unable to do so yourself? • Do you have a power of attorney?

Assistance for client in making health decisions

Question: Who makes or assist the client in making health decisions?	
Response options	• Self • Power of attorney • Advance health directive • Person responsible or appointed guardian
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • The assessor should identify who makes or assists the client with making health decisions. Consider and record: • Who makes or assists the client with health decisions. • Use the below definitions to assist with the response. ○ **Self:** the client makes health decisions by themselves.

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Question: Who makes or assist the client in making health decisions?	
	○ **Power of attorney:** the client has legally granted a person or trustee organisation the authority to act on the client's behalf. ○ **Advance health directive:** the client has formally detailed their values and preferences regarding future healthcare in a legally binding advance care directive. ○ **Person responsible or appointed guardian:** there is a person responsible or an appointed guardian who makes health decisions on behalf of the client. Prompts and/or observations: • When needing to make a health decision, who assists? • Have you put in place arrangements to determine who makes or assists you with health decisions? Support resources: • Advance care planning and directive | healthdirect

Assistance for client in making financial decisions

Question: Who makes or assist the client in making financial decisions?	
Response options	• Self • Power of attorney • Advance health directive • Person responsible or appointed guardian
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • The assessor should identify who makes or assists the client with making financial decisions. Consider and record: • Who makes or assists the client with financial decisions. • Use the below definitions to assist with the response.

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Question: Who makes or assist the client in making financial decisions?	
	○ **Self:** the client makes financial decisions by themselves. ○ **Power of attorney:** the client has legally granted a person or trustee organisation the authority to act on the client's behalf. ○ **Advance health directive:** the client has formally detailed their values and preferences regarding future healthcare in a legally binding advance care directive. ○ **Person responsible or appointed guardian:** there is a person responsible or an appointed guardian who makes health decisions on behalf of the client. <u>Prompts and/or observations:</u> • When needing to make a financial decision, who assists? • Have you put in place arrangements to determine who makes or assists you with financial decisions? <u>Support resources:</u> • Advance care planning and directive | healthdirect

Financial resources to meet emergencies

Question: Do you have enough financial resources to meet emergencies?	
Response options	• Yes • No
Question rules	**Base question**
Pre-populated information	No
Response guidance	<u>Context:</u> • The assessor should determine if the client has enough financial resources to meet emergencies. • For example, this is their ability to pay for any unexpected medical costs. <u>Consider and record:</u>

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Question: Do you have enough financial resources to meet emergencies?	
	• If the client has enough financial resources to meet emergencies. Prompts and/or observations: • Would you find it financially stressful to deal with a medical emergency?

Subject to a Mental Health Act order

Question: Is the client subject to a Mental Health Act order under the relevant state/territory Mental Health Act?	
Response options	• Yes • No
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • The assessor should identify if the client is subject to a Mental Health Act order (under relevant state/territory legislation). • A Mental Health Order is a legal mechanism that grants specific powers related to mental health treatment and care. Consider and record: • If the client is subject to a Mental Health Act order (under relevant state/territory legislation).

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Advance care plan

Question: Does the client have an Advance Care Plan?	
Response options	• Yes • No
Question rules	**Base question**

Question: Does the client have an Advance Care Plan?	
Pre-populated information	No
Response guidance	Context: • The assessor should identify if the client has an advance care plan. • An Advance Care Plan is a proactive process that allows individuals to express their preferences and wishes regarding future health care and medical treatment. Consider and record: • If the client has an advance care plan. Prompts and/or observations: • Do you have an advance care plan? • Have you formally expressed your preferences regarding future health care and medical treatments? Recommendations: • Develop an advance care plan. Support resources: • Advance care planning and directive | healthdirect

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Employment status

Question: What is the client's employment status?	
Response options	• Home duties • Retired for age • Retired for disability • Other
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context:

Question: What is the client's employment status?	

	• The assessor should determine what the is the client's current employment status.
	
	Consider and record:
	
	• The client's current employment status.
	• Use the below definitions to assist with the response.
	  ○ **Home duties:** the client is undertaking home duties only.
	  ○ **Retired for age:** the client no longer works due to age.
	  ○ **Retired for disability:** the client no longer works due to a disability preventing them from working.
	  ○ **Other:** any other response that does not align with the above options (e.g. volunteer work).
	
	Prompts and/or observations:
	
	• Are you currently employed?

Assessor observations on financial or legal details

Question: Financial or legal observations	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • This is to provide a holistically summary about the client's financial and legal circumstances. Consider and record: • Summary of any financial or legal issues being experienced by the client. • If the client has an advance care plan and/or a power of attorney. • Summary of if the client receives assistance in making health decisions.

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Question: Financial or legal observations	
	• If the client has sufficient financial resources to meet any emergencies. • If the client is subject to a Mental Health Act order. Prompts and/or observations: • Is there anything else you would like to talk about on the behaviour questions we discussed?

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Support considerations section

The purpose of the support considerations section of the IAT is to explore any health and safety concerns that the client is experiencing, and to highlight any diversity considerations that should be considered as part of the assessment.

Health and safety

Question: At risk of, or suspected, or confirmed elder abuse?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • The assessor should identify if the client is at risk of, or suspected, or confirmed elder abuse. • This indicator reflects people who are at risk of suspected abuse or there is confirmed abuse. The harm may be intentional or unintentional and may be caused by another person with whom the person has a relationship of trust. • People who are experiencing abuse may be at risk of harm and/or suffering neglect. They may be feeling unsafe and/or afraid of someone who hurts, insults, controls or threatens them, or prevents them from doing what they want. Consider and record: • If the client is at risk of, or suspected, or confirmed elder abuse. Prompts and/or observations: • Use the below background information to assist with any prompts or observations to look for. ○ Domestic violence and abusive relationships - signs, effects and support | healthdirect Support resources:

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Question: At risk of, or suspected, or confirmed elder abuse?	
	• Domestic violence and abusive relationships - signs, effects and support | healthdirect

Question: What types of elder abuse is the client at risk of or suspected?	
Response options	• Financial • Physical (including restraint) • Emotional • Sexual • Social • Neglect • Other
Question rules	**Base question**
Pre-populated information	No

Response guidance	Context:
	
	• The assessor should identify what types of elder abuse is the client at risk of or suspected to experience.
	• The types of abuse can include physical abuse, sexual abuse, psychological abuse and financial abuse (including lack of control of finances).
	• It can also involve neglect or failure to provide necessary food, shelter, clothing, medical care or emotional support.
	• Other issues that may play a role include carer stress, difficulties accepting care due to health status, family violence or conflict, isolation, dependency, psychological problems and addictive behaviours in the abuser.
	
	Consider and record:
	
	• What types of elder abuse is the client at risk of or suspected to experience.
	• Use the below definitions to assist with the response.
	  ○ **Financial:** maintaining control of finances, including restricting access to bank accounts, wages or pensions, providing a small 'allowance', hiding assets, preventing the person from working, sabotaging interviews or meetings, and theft.
	  ○ **Physical (including restraint):** direct assault on the body, such as strangulation, slapping, punching,

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Question: What types of elder abuse is the client at risk of or suspected?	
	kicking, shaking or pushing. It may also include using weapons or objects. Physical abuse can also include throwing objects, the denial of food and the destruction of property. ○ **Emotional:** blaming or ignoring the person ('sulking'), treating the person as inferior, saying their behaviour is inappropriate, questioning their sense of reality, emotional blackmail or suicide threats. The perpetrator might also stalk, spy on or follow the person. This may include monitoring emails or phone calls and using GPS tracking. ○ **Sexual:** any form of rape, unwanted or forced sexual activity, sexual threats and insults. ○ **Social:** isolating the victim from their family and friends, such as forbidding or preventing contact with them and ongoing rudeness to family and friends. The perpetrator might insist the person moves far away from family support or employment opportunities. ○ **Neglect:** failing to meet the basic physical or psychological needs of a person you're caring for, such as a child. This might include failing to protect them from physical harm or danger, or stopping them from getting medical care. It can also be neglect of, or unresponsiveness to, the other person's basic emotional needs. ○ **Other:** any other form of elder abuse not covered by the above. Examples include coercive control, spiritual abuse or verbal abuse. <u>Prompts and/or observations:</u> • Use the below background information to assist with any prompts or observations to look for. ○ Domestic violence and abusive relationships - signs, effects and support | healthdirect <u>Support resources:</u> • Domestic violence and abusive relationships - signs, effects and support | healthdirect

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Refusing assistance or services when there is a clear need

Question: Is the client refusing assistance or services when they are clearly needed to maintain safety and wellbeing?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • The assessor should seek to understand if the client is refusing assistance or services when they are clearly needed to maintain safety and wellbeing. Consider and record: • If the client is refusing assistance or services when they are clearly needed to maintain safety and wellbeing. Prompts and/or observations: • Have you recently denied help from family, friends or service providers with caregiving tasks such as taking medication, eating or self-feeding? • How often do you resist them from helping you?

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Self-neglecting personal care and/or safety, or exposed to risks

Question: Any evidence that the client is self neglecting of personal care, nutrition or safety?	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • The assessor should identify if there is any evidence that the client is self-neglecting of personal care, nutrition or safety.

Question: Any evidence that the client is self neglecting of personal care, nutrition or safety?	
	Consider and record: • If there is any evidence that the client is self-neglecting of personal care, nutrition or safety. Prompts and/or observations: • Observe the client's living conditions. • What do you typically eat? Do you try to ensure you have a good diet? • What is your personal care routine? What do you not bother with?

Details of self-neglecting personal care and/or safety, or exposed to risks

Question: Please specify	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • The assessor should summarise details on any evidence that the client is self-neglecting of personal care, nutrition or safety. Consider and record: • A summary of any evidence that the client is self-neglecting of personal care, nutrition or safety. Prompts and/or observations: • Observe the client's living conditions. • What do you typically eat? Do you try to ensure you have a good diet? • What is your personal care routine? What do you not bother with? • Can you share more detail about this?

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Question: Please specify	

May cause harm to themselves or others

Question: Risk client may cause harm to themselves or others	
Response options	• Yes • No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Response guidance	<u>Context:</u>
	
	• The assessor should indicate if the client may cause harm to themselves or others.
	• At risk behaviours are any behaviour that put the client or others at risk of harm.
	
	<u>Consider and record:</u>
	
	• If the client may cause harm to themselves or others.
	
	<u>Prompts and/or observations:</u>
	
	• Ask open-ended questions:
	  ○ Encourage dialogue by asking questions that allow the person to express themselves freely.
	• Listen actively:
	  ○ Be an attentive listener without judgment.
	  ○ Show empathy and validate their feelings.
	  ○ Avoid interrupting or rushing the conversation.
	• Observe signs and cues:
	  ○ Pay attention to behavioural cues that might indicate distress or risk:
	  ▪ Appearance: bloodstains, carrying potential weapons.
	  ▪ Physical activity: restlessness, agitation, clenched fists, hostile expressions.
	  ▪ Mood: anger, anxiety, tension, difficulty controlling emotions.
	  ▪ Speech: loud, threatening, slurred.
	
	<u>Support resources:</u>

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Question: Risk client may cause harm to themselves or others	
	• Self-harm - causes, warning signs and symptoms and when to seek help | healthdirect

Client diversity

Client identify

Question: Does the client identify as:	
Response options	• from a culturally and linguistically diverse background • an Aboriginal and/or Torres Strait Islander person • Living in a rural or remote area • Financially or socially disadvantaged • A Veteran • Homeless • At risk of being homeless • a lesbian, gay, bisexual, transgender, or intersex person • A person separated from parents or children by forced adoption or removal • A socially isolated individual • Other – please specify
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Response guidance	Context:
	• The assessor should determine if the client identifies as:
	  ○ From a culturally and linguistically diverse background;
	  ○ An Aboriginal and/or Torres Strait Islander person;
	  ○ A lesbian, gay, bisexual, transgender, or intersex person; and
	  ○ Another group that the client wishes to identify (such as any cultural and/or religious values or beliefs that are important to know).
	• This question is included to ensure their identify is considered as part of the assessment and the development of a support plan.
	• It is important for an assessor to be sensitive to the client's cultural beliefs and practices and to convey respect for the client's cultural values through the manner in which they

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Question: Does the client identify as:	
	communicate, and the recommendations in which they action. • Clients who identify as lesbian, gay, bisexual, transgender or intersex (LGBTI) rarely want to be solely defined by their sexual orientation, sex or gender identity, but for many it is an important part of who they are. Some LGBTI people are, or have been, very involved and visible in LGBTI communities and will happily identify and socialise with these communities. Others will have minimal contact with groups of LGBTI people. It is important to consider the needs of LGBTI people as distinct individuals and to take into account the diversity within the groups to which they belong. Each of the LGBTI communities may have their own needs, as do the individual people in these groups. For example, some LGBTI people will want to be able to move through the aged care system without disclosing their sexual orientation, sex or gender identity. Others will strongly wish to disclose and have their identity recognised and embraced. Others may not have any choice about disclosing – which can often be the case for transgender or intersex people. It is important for those assessing clients for aged care services to consider the impact of the historical discrimination faced by older LGBTI people and its effect on LGBTI people using aged care services. While legislative reforms have gone a long way to promoting equality, many LGBTI people hide their sexual orientation, sex or gender identity on a daily basis because they continue to fear discrimination. The experience of discrimination has a detrimental impact on the health and wellbeing of LGBTI people. There is now clear evidence that the more discrimination an LGBTI person encounters, the poorer their health and wellbeing. • The term 'care leavers' refers to children who were in institutional and other out-of-home care prior to the year 2000, including: ○ Forgotten Australians - people who spent a period of time as children in children's homes, orphanages, and other forms of out-of-home care prior to the year 2000. ○ Former Child Migrants - children who arrived in Australia through historical child migration schemes and were subsequently placed in homes and orphanages.

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Question: Does the client identify as:	
	○ Stolen Generations - children of Aboriginal and Torres Strait Islander descent who were removed from their families and communities by federal and state government agencies from the late 1800s to the 1990s. Assessors should be particularly sensitive to the effects of care-leavers' childhood experiences with government officials, authorities and institutional care. These individuals may have experienced complex trauma and have general distrust of institutions and Government departments. Assessors should consider how to best support older people in the most sensitive and respectful way with an awareness and understanding of how childhood experiences may influence their concerns, preferences and decisions in relation to aged care, and emphasise that older people can have a support person at the assessment and that they are not obliged to take up any approved care. <u>Consider and record:</u> • If the client identifies as: ○ From a culturally and linguistically diverse background; ○ An Aboriginal and/or Torres Strait Islander person; ○ A lesbian, gay, bisexual, transgender, or intersex person; and ○ Another group that the client wishes to identify. • <u>Important for clients who are care leavers:</u> ○ Under Support at Home, individuals who are care leavers are eligible for a care management supplement which will be credited to their provider's care management account. ○ To identify individuals who are eligible for a care management supplement during the assessment, assessors must use the diversity fields in the IAT, which do not currently capture care leavers. ○ Assessors who have identified individuals who are care leavers during the assessment should select the diversity field 'a person separated from your parents or children by forced adoption or removal'. ○ This will ensure Services Australia is able to identify these individuals from the assessment and apply a care management supplement to their provider's care management account. Refer to the Support at

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Question: Does the client identify as:	
	Home Program Manual for more information on care management supplements. Prompts and/or observations: • This question may be sensitive to the client, so it should be raised in a sensitive manner.

Assessor notes on support considerations

Question: Assessor notes	
Response options	Textbox for written response
Question rules	**Base question**
Pre-populated information	No
Response guidance	Context: • This is to provide a holistic summary about the client's support considerations. Consider and record: • Summary of any elder abuse considerations. • Summary of if the client is refusing any assistance or services when they are offered. • If the client is demonstrating self-neglecting personal care and/or safety, and what this entails. • If the client is at risk of harm to themselves or others. • Client diversity considerations. • If there is any information that would affect service provision for client's who identify as belonging to a diverse group (e.g. preference of care type, service provider). Prompts and/or observations: • Are there any cultural considerations I should know about to serve your health needs? • So that I might be aware of and respect your cultural beliefs and values, could you tell me if you have any special dietary restrictions related to your beliefs or times

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Question: Assessor notes	
	during the year when you change your diet in celebration of religious and other ethnic holidays? • Do you use any traditional health remedies to improve your health? • Are there certain healthcare procedures and tests which your culture prohibits? • The information provided by the client. Specific information relevant to previous experiences with service provision. • Is there anything else you would like to talk about on the behaviour questions we discussed? Recommendations • Any linking support that may be appropriate Support resources • Silver Rainbow: Ageing and Aged Care for LGBTIQ+ people - www.lgbtiqhealth.org.au/silver_rainbow

Urgent Service Provision

Question: Does the client require urgent service provision?	
Response options	○ Yes ○ No
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • The response to this question is one of multiple factors used by the system to calculate a priority category for the person for the Support at Home Priority System. Other information is also used to calculate a priority category. • An older person's priority for funding is based on their personal circumstances and characteristics. Consider and record: An older person can be determined to need urgent service provision if the older person:

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Question: Does the client require urgent service provision?	
	○ is considered at urgent and immediate risk in terms of their personal safety; and/or ○ is at immediate risk of admission into residential care; and/or ○ Has a carer, and the carer arrangements are unsustainable, or the carer is at crisis point The My Aged Care Assessment Manual. provides further guidance to assist assessors in determining whether an older person requires urgent service provision and the Support at Home Priority System.

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Support plan

Identified needs

Assessment summary

Question: Assessment Summary	
Response options	Textbox for written response
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes – Reason for assessment section – main reason for seeking assessment Assessment details section – assessment mode Assessment details section – assessment setting Assessment details section – assessment information was collected from Function – summary of function notes Medical and medications section – health condition/s Carer profile section – details of carer Carer profile section – carer's relationship to client Carer profile section – selected support types Carer profile section – assessor notes about caring relationship Carer profile section – factors affecting carer availability and sustainability of caring relationships Cognition section – assessor notes on cognition Behaviour section – assessor notes on behaviours
Response guidance	<u>Context:</u> • The assessment summary will have the option to pre-populate information based on what is recorded by the assessor during the assessment. However, an assessor will have the ability to change this manually. • Assessors are able to finalise the support plan, but keep it open for the duration of the support period. <u>Consider and record:</u> • The assessment summary should follow the ISBAR format: ○ Introduction ○ Situation ○ Background ○ Assessment

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Question: Assessment Summary	
	○ Recommendations. • The assessment summary needs to be written in language the client can understand. It can also be used to inform the client's representative(s), healthcare professionals and service providers of the assessment findings and outcomes. It is also a useful tool that informs ongoing discussion, monitoring and review.

Functional needs

Question: Functional Needs	
Response options	Read only pre population information.
Question rules	**Base question** that is mandatory to complete.
Pre-populated information	Yes: • Response will pre-populate from function section of IAT if 'add as a functional need' box is ticked for the corresponding functional questions below: ○ Get to places out of working distance ○ Go shopping ○ Prepare meals ○ Undertake light housework ○ Take medicine ○ Handle money ○ Walk ○ Take a bath or shower ○ Dressing ○ Eating ○ Transfers ○ Toileting – bladder ○ Toileting – bowels ○ Undertake housework (heavy/moderate) ○ Use telephone ○ Use other communication device ○ Use online services ○ Wheelchair mobility ○ Climb stairs ○ Grooming ○ Upper body strength ○ Toilet use

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Question: Functional Needs	
	• Arrow located next to each prepopulated response will link back to the corresponding IAT question should a change be required.
Response guidance	Context: • This refers to where information relating to a client's functional needs is populated from the assessment into the support plan. Consider and record: • It is important for an assessor to ensure all identified needs are considered as part of the goals, considerations and recommendations included in the support plan.

Other considerations

Question: Other Considerations	
Response options	• Read only pre population information.
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes Response will pre-populate from the IAT if 'add as Other Consideration' box is ticked for the corresponding questions below: ○ Social and community participation ○ Carer sustainability ○ Respite ○ Health literacy ○ Sensory concerns ○ Communication difficulties ○ Slips, trips and falls ○ Driving ○ Oral Health ○ Swallowing ○ Appetite, weight loss and fluid intake ○ Skin conditions ○ Pain ○ Sleep ○ Physical activity ○ Alcohol use ○ Recent hospitalisation ○ Health conditions

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Question: Other Considerations	
	○ Allergies and/ or sensitivities ○ Changes in memory and thinking ○ Changes in personality ○ Changes in behaviour ○ Feelings of nervousness or depression ○ Feelings of loneliness or social isolation ○ Psychological considerations ○ Home safety ○ Home maintenance (including gardening) ○ Personal safety ○ Tobacco use • Arrow located next to each prepopulated response will link back to the corresponding IAT question should a change be required.
Response guidance	Context: • This refers to where information relating to a client's other considerations is populated from the assessment into the support plan. Consider and record: • It is important for an assessor to ensure all identified needs are considered as part of the goals, considerations and recommendations included in the support plan.

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Complexity indicators

Question: Complexity Indicators	
Response options	• Read only pre population information.
Question rules	**Base question** that is mandatory to complete
Pre-populated information	Yes: Response will pre-populate from the IAT if 'add as Complexity Indicator' box is ticked for the corresponding questions below: • Client is living in inadequate housing or with insecure tenure or is already homeless which compromises their health, wellbeing, and ability to remain living in the community

Question: Complexity Indicators	
	• There is risk of, or suspected or confirmed abuse • Client has emotional or mental health issues that significantly limits self-care capacity, requires intensive supervision and/or frequent changes to support • Client is experiencing financial disadvantage or other barriers that threaten their access to services essential to their support • Client has experienced adverse effects of institutionalisation and/or system abuse (e.g. spending time in institutions, prisons, foster care. Residential care or out of home care) and is refusing assistance or services when they are clearly needed to maintain safety and wellbeing • Client is exposed to risks due to drug and/or alcohol related issues and likely to cause harm to themselves or others • Client is exposed to risks or is self-neglecting of personal care and/or safety and likely to cause harm to themselves or others • Client has a memory problem or confusion that significantly limits self-care capacity, requires intensive supervision and/or frequent changes to support • Exposure to risks due to drug and/or alcohol issues response will pre-populate from physical and personal health and frailty section of IAT (if 'daily or almost daily' is selected for question on consumption of six or more alcoholic drinks on one occasion; or if 'daily or almost daily', 'weekly' or 'monthly' is selected for question on illicit drug use for non-medical purposes) Arrow located next to each prepopulated response will link back to the corresponding IAT question should a change be required.
Response guidance	<u>Context:</u> • This refers to where information relating to a client's complexity indicators is populated from the assessment into the support plan. <u>Consider and record:</u>

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Question: Complexity Indicators	
	• It is important for an assessor to ensure all identified complexity indicators are considered as part of the goals, considerations and recommendations included in the support plan.

Goals and recommendations

- Area of concern and Goal section of the support plan should be completed prior to finalising the IAT.

Area of concern

Question: What is the area of concern?	
Response options	Textbox for written response
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • Areas of concern should capture key information about the client's life, interests, abilities and challenges. It is not a list of the client's problems, or a list of the services they wish to receive. Ask the client to prioritise their areas of concern. Consider and record: • Short and simple areas of concerns that can be addressed through one or more of the client's goals.

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Goal

Question: What is the Client's Goal?	
Response options	Textbox for written response
Question rules	**Base question** that is mandatory to complete

Question: What is the Client's Goal?	
Pre-populated information	No
Response guidance	Context: • Goal setting with the client enables assessors to have a clear focus on the priorities for the client, to be addressed through the client's support plan. • Evidence demonstrates that setting goals that align with the client's values and priorities encourages the client to take responsibility and commit to making the changes necessary to improve their health and wellbeing. Evidence also shows that the assessment process alone is insufficient to improve outcomes – it needs to be followed by goals, strategies and solutions to address the issues identified. • Throughout the assessment, it is likely that the person will have referred to various goals but they are not seen as, or called, 'goals'. An assessor should identify these goals and have a conversation with the client about them. • Typical goals that are not specific and where an assessor could investigate further include: o 'I want to remain at home' ▪ What do you need to be able to do to stay at home? It could be that the steps required are to improve their walking and balance; or that the client needs to be able to shower independently. ▪ What is it about being at home that is important to you? This can help clarify what the client needs to do personally to stay at home i.e. they have a dog/cat to look after or love their garden. o 'I want to get to the local shops/church/social club/work place' ▪ Ask what they need to be able to do to get to the local shops. It could be that they need to improve their walking and balance; need to learn to use a walking aid; look at purchasing a scooter. o 'I want to stay independent' ▪ Ask what they think they need to be able to do to remain independent.

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Question: What is the Client's Goal?	

	• To achieve any goal there may be a series of steps to underpin the goal. For example, if the goal is to go to the local shops, depending on the person's circumstances the smaller steps may include needing to be able to dress themselves; walk to the front door or down the front path; get in and out of a car; get up/down steps; walk 500 metres; balance a cup of coffee; be continent; get on and off a chair; learn to take medications at the right time etc.
	• Assessors need to ensure that they maintain an empowering, strengths-based approach that values the individual needs and preferences of the client. This is particularly important where a client has limited insight, has difficulties making decisions (e.g. due to dementia or a cognitive impairment), mental health concerns, communication difficulties (e.g. clients who are non-verbal), has limited or no English language skills, is from a culturally and linguistically diverse background, has a terminal condition and/or is receiving palliative care and/or limited motivation or is resistant to care.
	
	<u>Consider and record:</u>
	
	• What is the client's goal?
	• Tick most relevant domain that goal area relates to?
	  ○ Physical function
	  ○ Cognitive function
	  ○ Social Support
	  ○ General health
	  ○ Personal Health
	  ○ Home/personal safety
	  ○ Other
	
	<u>Prompts</u>
	
	• What's working well for you at the moment that we could build on?
	• What do you do well?
	• What are the things that you're managing well with at the moment or feel good about?
	• What are your interests? What do you enjoy?
	• What gives you a sense of accomplishment, confidence or makes you proud?
	• Who are the people that are especially important to you? Tell me about these relationships.

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Question: What is the Client's Goal?	
	• What motivates you to do things to improve your health and wellbeing? • Tell me about your daily routine and what makes a good day for you? • What are the things you do, each day or each week, because you really want to – not because you have to? • Can you describe how you do specific tasks and their components (for example, can push a shopping trolley and select items from a shelf but cannot lift heavy bags; can push the vacuum but cannot bend down to plug it in; can shower but cannot step over the bath edge into the shower)?

Client's current strengths and abilities in relation to goal

Question: What are the client's current strengths and abilities in relation to this goal?	
Response options	Textbox for written response
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	<u>Context:</u> • A strengths-based and solution-focused approach to assessment and support planning requires the assessor to identify the person's strengths, talents, capabilities and resources through a conversational dialogue. The assessor can encourage the person to develop and use these strengths to work on particular goals and tasks in their support plan. <u>Consider and record:</u> • The client's current strengths and abilities in relation to the goal.

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Client's current areas of difficulty in relation to goal

Question: What are the client's current areas of difficulty or activities where the client needs support in order to achieve this goal?	
Response options	Textbox for written response
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • Having a client identify their areas of difficulty and/or the supports they need assists the client to understand their current limitations that need to be further developed in order to achieve their goal. Having this conversation helps to ensure that the client is not a passive recipient of the support but a determinant of it and therefore far more likely to achieve any goals related to the support. Consider and record: • The client's current areas of difficulty or activities where the client needs support in order to achieve the goal.

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Carer Support for Client Goals

Question: What support does the client's carer provide to achieve this goal?	
Response options	Textbox for written response
Question rules	Not mandatory
Pre-populated information	No
Response guidance	Context: • Understanding what supports the client's carer provides in achieving a goal is important to ensure a shared expectation of how that goal will be achieved. Having this conversation helps to ensure that the client and their carer are not passive recipient of the supports but a determinant of it and therefore are far more likely to achieve any goals. Consider and record:

Question: What support does the client's carer provide to achieve this goal?	
	• The client's current areas of difficulty or activities where the client's carer provides support to achieve the goal.

Focus of client's goal

Question: What is the focus of the goal for the client?	
Response options	Tick box select option
Question rules	Mandatory to complete
Pre-populated information	No
Response guidance	Tick the box/boxes that apply: • To regain a function? (e.g. physical, cognitive or social) • To compensate for a declining function? (e.g. physical, cognitive or social) • To receive care for a lost or declining function? (e.g. physical, cognitive or social)

Client's rating of goal importance

Question: How important is it to the client to achieve this goal?"	
Response options	• 1 • 2 • 3 • 4 • 5 • 6 • 7 • 8 • 9 • 10
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context: • It is useful to understand how important it is to a client to achieve each of their goals. This enables assessors to

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Question: How important is it to the client to achieve this goal?"	
	discuss and prioritise recommendations and supports associated with each goal. Consider and record: • The client's rating of each goal's relative importance on a scale from 1 (not important) to 10 (very important). • This rating is to be made by the client, not by the assessor.

Goal status

Question: Goal Status	
Response options	• In progress • Achieved • No longer relevant
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No

Response guidance	Context:
	
	• In developing the support plan with the client, the client's goal should be set to 'in progress'. When undertaking a review or new assessment, the assessor should review the client's progress towards achieving their goals and update the goal status.
	
	Consider and record:
	
	• Assessors can:
	  ○ Edit or remove goals or concerns from a client's Support Plan. These may be goals and/or concerns that have been recently added, or added by a previous assessor.
	  ○ Edit or remove recommendations in some instances. This will depend on the status of any associated referrals.
	  ○ View the history of goals, concerns and recommendations by viewing the Support Plan history.

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IAT Outcome and Classification

Question: IAT outcome	
Response options	Read only system generated IAT outcome and read only display of current assessment type.
Question rules	**Read only response**
Pre-populated information	Yes
Response guidance	Context: • The system generated IAT outcome will only display if IAT mandatory questions are completed AND assessors select the '*finalise IAT and continue to support plan'* button when proceeding to the support plan. Completing all the IAT mandatory fields and selecting '*save questionnaire and continue to support plan'* will NOT result in an IAT outcome displaying. Consider and record: • Ensure that all information in the IAT is correct prior to selecting the '*Finalise IAT and continue to Support plan'* button. Once this button is selected the IAT will be locked and no further changes to the IAT can be made by the assessor or the assessment delegate. • Ensure that you complete the Client concerns and goals section before finalising the IAT. You may select the '*save questionnaire and continue to support plan'* to navigate between the IAT and Concerns and goals section. However, you must select the finalise IAT and continue to support plan to enable the IAT outcome to appear and to make aged care service recommendations.

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Question: IAT outcome ACCEPT or OVERRIDE	
Response options	Tick box selection
Question rules	**Base question** that is mandatory to complete
Pre-populated information	No
Response guidance	Context:

Question: IAT outcome ACCEPT or OVERRIDE	
	• Once the system generated IAT outcome displays, the assessor will have to ACCEPT or OVERRIDE the system generated IAT outcome. **Accepting the IAT outcome:** • 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 'ineligible for CHSP/SaH', the person is not eligible to receive CHSP or ongoing SaH. In this circumstance the system will display a prompt to override to a higher classification. Assessors must not take this action. If by considering the eligibility criteria in the *Aged Care Act 2024* for residential care or transition care, the assessor wants to recommend these care types, it is appropriate to accept the ineligibility outcome and recommend these care types in the support plan. The possible IAT outcomes displayed are: • Ineligible for CHSP/SaH • CHSP • SaH Classification 1 • SaH Classification 2 • SaH Classification 3 • SaH Classification 4 • SaH Classification 5 • SaH Classification 6 • SaH Classification 7 • SaH Classification 8 **When the ACCEPT button is selected**, the 'Add Home Support services' page will display **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),

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Question: IAT outcome ACCEPT or OVERRIDE	
	• Permanent Residential Care without ongoing in-home services, • Residential Respite care without ongoing in-home services. 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. **When the OVERRIDE button is selected**, the 'Override IAT outcome' page will display, and assessors must provide an override reason AND override reason description. If recommending Restorative Care Pathway or End of Life Pathway, the 'Add Home Support services' page will then display. • When completing the '**Add Home Support services'** page, assessors select which service and service sub types (see list below) the client will be able to access under the SaH classification level. • All service sub types (except those for Allied health and therapy and Therapeutic Services for Independent living) will be preselected (see list below). • **For 'Allied health and therapy' and 'Therapeutic Services for Independent living':** these service sub types will not be pre-selected and the assessor must select the relevant service subtype. Assessors should consider the service subtypes that align with the person's assessed care needs. • **For all other service types:** assessors should select the service types that align with the person's assessed care needs. For each service type, assessors need to either retain all or unselect all service sub types (i.e. there shouldn't be some sub-types selected and some unselected under a service type). • If a service or service sub type is not selected and the client subsequently needs that service or service subtype, the client will need to request this via a SPR. • After completing either the ACCEPT or OVERRIDE button, a new field will display under the IAT Outcome indicating what the assessor Recommended classification is. **Domestic Assistance (Service Type)** • General House cleaning *(service sub type)*

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Question: IAT outcome ACCEPT or OVERRIDE	
	• Laundry services • Shopping assistance • Gardening • Assistance with home maintenance and repairs • Expenses for home maintenance and repairs **Home maintenance and repairs** • Gardening • Assistance with home maintenance and repairs **Meals** • Meal delivery • Meal preparation **Allied health and Therapy** • Allied health assistance • Podiatry • Social work • Speech pathology • Diet or nutrition • Aboriginal or Torres Strait Islander Health Practitioner assistance • Aboriginal or Torres Strait Islander Health worker assistance • Physiotherapy • Exercise physiology • Occupational therapy • Counselling or psychotherapy • Music Therapy **Personal care** • Assistance with self care and activities of daily living • Assistive with self-administration of medications • Continence management (non-clinical) **Nursing Care** • Registered nurse clinical care • Enrolled nurse clinical care • Nursing assistant clinical care • Nursing care consumables **Social support and community engagement** • Group social support • Individual social support • Accompanied activities **Transport** • Direct transport • Indirect transport **Care Management**

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Question: IAT outcome ACCEPT or OVERRIDE	

	• Home support care management
	Restorative care management
	• Home support restorative care management
	Therapeutic services for independent living
	• Acupuncture
	• Chiropractics
	• Diversional Therapy
	• Remedial massage
	• Art Therapy
	• Osteopathy
	Hoarding and squalor assistance
	• Hoarding and squalor supports
	Nutrition
	• Nutrition supports
	Home or community general respite
	• Flexible respite
	• Community and centre-based respite
	Equipment and products
	• Managing body functions
	• Self-care products
	• Mobility products
	• Domestic life product
	• Communication and information management products
	• Assistive technology prescription and clinical support
	Home adjustments
	• Home modifications products
	• Home modifications prescription and clinical support
	
	<u>Consider and record:</u>
	
	• Assessor has ability to recommend the service frequency and intensity.
	  ○ If 'Other-Specify' has been selected for intensity, free text field will be displayed.
	  ○ These fields are not mandatory for the assessor
	• If the IAT outcome is a SAH program and the current assessment type is Home Support, the assessor must convert the assessment type to a comprehensive in order to recommend a SaH service.
	• You will also be able to link each service to a goal.
	• If the assessor recommends classification = '**SaH Restorative Care Pathway**' then:

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Question: IAT outcome ACCEPT or OVERRIDE	
	○ 'Care management' service type will not be displayed ○ 'Restorative care management' service type will be displayed along with 'Home support restorative care management' service, it will be selected and read only. • If the assessor recommends classification '**SaH Classification 1-8**' or '**SaH End-of-Life Pathway**' then: ○ 'Restorative care management' service type will not be displayed ○ Care management' service type will be displayed along with Home support care management' service, it will be selected and read only.

Add a General recommendation

Question: Add a General Recommendation	
Response options	Textbox for written response
Question rules	**Base question** that is not mandatory to complete NB: This question will be blocked for completion until all IAT mandatory questions are completed AND the assessor selects the 'finalise IAT and continue to support plan' button AND the IAT outcome is either ACCEPT or OVERRIDE.
Pre-populated information	No
Response guidance	• <u>Context:</u> • General recommendations relate to a type of support that is non-Commonwealth funded and will generally be actioned by a client, or in some instances by an assessor. • Recommendations may include that the client sees a health practitioner for a particular concern, that they join a local support group or engage in an activity that they wish to undertake. • A general recommendation can be associated to one or more of the client's goals. <u>Consider and record:</u>

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Question: Add a General Recommendation	
	• Assessors can add general recommendations to a client's support plan. General recommendations must identify whether there is an action to be taken by the assessor, client and/or someone else.

Add a Service recommendations

Question: Add a Service Recommendation	
Response options	• **Allied Health and Therapy Services** – Aboriginal and Torres Strait Islander -Note that ATSI is not an appropriate acronym, Health Worker; Dietitian or Nutritionist; Diversional Therapy; Exercise Physiologist; Hydrotherapy; Occupational therapy; Ongoing Allied Health and Therapy Services; Other Allied Health and Therapy Services; Physiotherapy; Podiatry; Psychologist; Restorative Care Services; Social Work; Speech Pathology. • **Assistance with Care and Housing** – Advocacy – Financial, Legal etc.; Assessment – Referrals etc.; Hoarding and Squalor. • **Case Management.** • **Centre-based Respite** – Centre Based Day Respite; Community Access – Group; Residential Day Respite. • **Client Care Coordination.** • **Cottage Respite** – Overnight Community Respite. • **Domestic Assistance** – General House Cleaning; Linen services; Unaccompanied Shopping (delivered to home). • **Flexible Respite** – Flexible Respite; Host Family Day Respite; Host Family overnight Respite; In-home Day Respite; In-home Overnight Respite; Mobile Respite; Other planned respite. • **Equipment and products -** Self-care products; Mobility products; Domestic life products; Communication and information management products; Managing body functions • **Home adjustments -** Home modifications • **Home maintenance** – Garden Maintenance; Major Home Maintenance and Repairs; Minor Home Maintenance and Repairs. • **Meals** – At Centre; At Home. • **Multi-Purpose Service Program (MPSP)** – Residential – Shared room + Ensuite; Shared room + no bathroom or Ensuite; Shared room + shared Bathroom; Single room +

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Question: Add a Service Recommendation	
	Ensuite; Single room + no bathroom or Ensuite; Single room + shared Bathroom. • **National Aboriginal and Torres Strait Aged Care Program (NATSIFACP).** • **Nursing.** • **Other Food Services** – Food Advice, Lessons, Training, Food Safety; Food Preparation in the Home. • **Personal Care** – Assistance with client self-administration of • medicine; Assistance with Self-Care. • **Social Support Group.** • **Social Support Individual** – Accompanied Activities e.g. Shopping; Telephone/Web Contact; Visiting. • **Specialised Support Services** – Client Advocacy; Continence Advisory Services; Dementia Advisory Services; Hearing Services; Other support services; Vision Services. • **Transport** – Direct (driver is volunteer or worker); Indirect (through vouchers or subsidies).
Question rules	**Base question** that is not mandatory to complete NB: This question will be blocked for completion until all IAT mandatory questions are completed AND the assessor selects the 'finalise IAT and continue to support plan' button AND the IAT outcome is either ACCEPT or OVERRIDE.
Pre-populated information	No

Response guidance	<u>Context:</u>
	
	• The assessor can add/change service recommendations to a client's support plan (e.g. Commonwealth Home Support Program services).
	• Assessors can recommend:
	  • CHSP services
	  • Multi-Purpose Service – Residential
	  • National ATSI Aged Care Program
	• NB: This question will be dithered out and blocked for completion until all IAT mandatory questions are completed AND the assessors selects the 'finalise IAT and continue to support plan' button. This is to ensure that a system generated IAT outcome is displayed.
	
	<u>Consider and record:</u>

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Question: Add a Service Recommendation	
	• The relevant service type and (where required) service sub-type. • The priority to be associated with the referral to the service type. • Recommended frequency and intensity of the service, if discussed with the client. • Recommend a start date for when services should be started. For example, to start when the client's carer is leaving to go on holidays. • Recommend a review date for the service provider to review the delivery of services in line with the client's goals. For example, the client should have met some or all of their goals within six weeks and a review should then occur to see whether current levels of service provision should reduce or cease. • Recommend an end date for service provision. For example, the client's carer will be returning and therefore services should no longer be required. • Whether there is an action to be taken by the assessor, client and/or someone else. • Whether the service recommendation is associated to one or more of the client's goals. • Assessors can: o Edit or remove recommendations in some instances. This will depend on the status of any associated referrals. o View the history of recommendations by viewing the support plan history.

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Recommend an Assistive Technology (AT)

Question: Recommend an Assistive Technology	
Response options	Drop down menu with list of values
Question rules	**Base question** that is not mandatory to complete
Pre-populated information	No
Response guidance	Context: • If recommending AT, assessor must select the AT Classification type.

Question: Recommend an Assistive Technology	
	• If the selected AT classification type is Short-term, then the resulting page will require the assessor to select the appropriate AT tier and relevant service type and services. • If the selected AT classification type is Ongoing, the page displays Specified Needs and relevant information. • If there are concerns and goals on the client's support plan, the option to link goals will be available. <u>Consider and record:</u> • An assessor must use clinical reasoning to determine if a client has assistive technology needs • This should be determined through information collected from the assessment and information when answering all IAT questions • The assessor must consider the needs of the client and how assistive technology can help a client continue to live at home more independently • To be eligible for AT the client must be eligible for SaH Home Support

Recommend a Home Modification (HM)

Question: Recommend a Home Modification	
Response options	Drop down menu with list of values
Question rules	**Base question** that is not mandatory to complete
Pre-populated information	No
Response guidance	<u>Context:</u> • If recommending HM, assessors have the option to select the HM Tier. • If recommended classification is SaH Restorative Care Pathway, then only Medium and Low Tier will be available. • If there are concerns and goals on the client's support plan, the option to link goals will be available. <u>Consider and record:</u> • An assessor must use clinical reasoning to determine if a client has home modifications needs

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Question: Recommend a Home Modification	
	• This should be determined through information collected from the assessment and information when answering all IAT questions • The assessor must consider the needs of the client and how home modifications can help a client continue to live at home more independently • To be eligible for HM you must be eligible for SaH Home Support • However exception is, if you are eligible for EoL you are not eligible for HM

Recommend a period of linking support

Question: Recommend a period of linking support	
Response options	• Short term assistance to access aged care services • Short term assistance to access support outside aged care • Urgent intervention to address risks or issues • Interim support to access specialist linking service • Interim support to access ongoing case management service • Supplementary support to access services in addition to Assistance • with Care and Housing • Assistance with Care and Housing unavailable in region • Other
Question rules	**Base question** that is not mandatory to complete NB: This question will be dithered out and blocked for completion until all IAT mandatory questions are completed AND the assessor selects the 'finalise IAT and continue to support plan' button AND the IAT outcome is either ACCEPT or OVERRIDE.
Pre-populated information	No
Response guidance	<u>Context:</u> • Where an older person's complex circumstances may impede their access to aged care services, linking support will assist in linking the client to various services they

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Question: Recommend a period of linking support	
	require in order to live in the community with dignity, safety and independence. • Linking support activities are aimed at working with the client to address areas of vulnerability that are preventing access to receiving mainstream aged care support, to the extent that the client is willing or able to access aged care services. • The level of linking service support offered in My Aged Care is time limited, and is not designed to provide ongoing support services. • Clinical and non-clinical assessors are able to add periods of linking support to a client's Support Plan for comprehensive and home support assessments, nominating the start date, recommended end date, reason for the period of support, and any associated comments. At the end of individual periods of linking support, assessors are to indicate the end date, the outcome of the period of support and add any associated comments. • A warning (yellow banners) will display for assessors and delegates when a client is already undergoing support. • Assessment Delegates will be able to edit or make corrections to the linking support and reablement section during the support period • More information on linking support is available in the My Aged Care Assessment Manual.

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Recommend a period of reablement

Question: Recommend a period of reablement	
Response options	• Rebuild confidence and independence in mobility • Support the development/relearning of daily activities • Task simplification and energy conservation for managing housework • Promote social contact, community access and integration • Skills development in using public transport • To supporting independence through assessment for appropriate • aids and equipment • Training in the use of assistive technology • Helping people to manage personal finances • Other
Question rules	**Base question** that is not mandatory to complete

Question: Recommend a period of reablement	
	NB: This question will be blocked for completion until all IAT mandatory questions are completed AND the assessors selects the 'finalise IAT and continue to support plan' button AND the IAT outcome is either ACCEPT or OVERRIDE.
Pre-populated information	No

Response guidance	<u>Context:</u>
	• Clinical and non-clinical assessors will be able to recommend reablement and linking support for clients
	• All assessors need to work with the client to identify whether they would benefit from a reablement approach based on their needs and goals as well as identify linking support they may require.
	• Reablement involves time-limited interventions that are targeted towards a person's specific goal or desired outcome to adapt to some functional loss, or regain confidence and capacity to resume activities.
	• If the client agrees that short term reablement support is appropriate and/or beneficial to them, assessors should include service solutions within the Support Plan to:
	  ○ Promote their independence;
	  ○ Assist them to maintain and/or strengthen their capacity to undertake daily activities; and/or
	  ○ Maintain social and community connections.
	• When recommending a period of reablement, assessors are required to select a reason from a list of values in the assessor portal and app.
	• Supports could include training in a new skill, modification to a client's home environment or having access to equipment or assistive technology.
	• Assessors can add periods of reablement to a client's support plan, nominating the start date, recommended end date, reason for the period of support, and any associated comments.
	• At the end of individual periods of reablement, assessors are to indicate the end date, the reason for the end date, the outcome of the period of reablement and add any associated comments.
	• A warning (yellow banners) will be displayed if client is already undergoing reablement

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Question: Recommend a period of reablement	
	• Assessors can make changes to a client's support plan during the allocated time frame for the sake of better supporting the client's need as their abilities develop and change • Assessors are able to finalise the support plan, but keep it open for the duration of the support period • More information on reablement is available in the My Aged Care Assessment Manual.

Add a recommended long-term living arrangement

Question: Add a recommended long term living arrangement	
Response options	• Private residence • Independent living within a retirement village • Supported community accommodation • Residential aged care service • Hospital • Other institutional care • Other community
Question rules	**Base question** that is not mandatory to complete NB: This question will be dithered out and blocked for completion until all IAT mandatory questions are completed AND the assessor selects the 'finalise IAT and continue to support plan' button AND the IAT outcome is either ACCEPT or OVERRIDE.
Pre-populated information	No
Response guidance	Context: • Following a **comprehensive assessment**, and after discussing the goals with the client and/or their representative, the most appropriate long-term care should be identified from the list of accommodation settings. Consider and record: • Use the below definitions to assist with the response. ○ **Private residence:** Includes private residences such as houses, flats, units, caravans, mobile homes, boats and marinas.

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Question: Add a recommended long term living arrangement	
	○ **Independent living within a retirement village:** Includes living in self-care independent-living units within a retirement village irrespective of the type of tenure held over the residence. Living in a retirement village with the provision of care services should be listed as supported community accommodation. ○ **Supported community accommodation:** Includes community living settings or accommodation facilities in which clients are provided with support in some way by staff or volunteers. This category includes domestic-scale living facilities (such as group homes for people with disabilities, cluster apartments where a support worker lives on site, community residential apartments, congregate care arrangements, etc.) which may or may not have 24-hour supervision and care; larger-scale supported accommodation facilities providing 24 hour supervision and support services by rostered care workers (such as hostels for people with disabilities and government-regulated Supported Residential Services/Facilities); Aged Care Flexible service pilots. ○ **Residential aged care service:** Includes permanent residents of residential aged care services (formerly nursing homes and aged care hostels) and multi-purpose services or multi-purpose centres. ○ **Hospital:** Refers to recommendations for long-term care in a hospital setting. ○ **Other institutional care:** Includes other institutional settings which provide care and accommodation services such as hospices and long-stay residential psychiatric institutions. ○ **Other community:** Includes all other types of community settings.

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Add a care type for Delegate Decision

Question: Add a care type for Delegate Decision	
Response options	• Residential Permanent • Residential Respite • Transition Care • No Care Approval

Question: Add a care type for Delegate Decision	
Question rules	If a non-clinical assessor recommends aged care program other than CHSP, they will need to convert the assessment to a comprehensive assessment and seek the supervision of a clinical assessor in accordance with their organisation's clinical governance framework and standard operating procedures. NB: This question will be blocked for completion until all IAT mandatory questions are completed AND the assessor selects the 'finalise IAT and continue to support plan' button AND the IAT outcome is either ACCEPT or OVERRIDE.
Pre-populated information	No
Response guidance	Context: • Following a **comprehensive assessment**, care type recommendations relate to care types under the Act which require approval by an Assessment Delegate. More information is available in the My Aged Care Assessment Manual. Consider and record: • The care type that applies. • If time limited, the date by which the approval stops • The urgency of the care type chosen • Residential Respite Care Priority will change to 'Urgency'. • Urgency will be set as High and read-only. • Where an assessor wishes to recommend multiple care types, they must enter each care type individually.

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Add 'No care type under the Act'

Question: Add 'No care type under the Act'	
Response options	• Client withdrew application • Client hasn't applied for care
Question rules	Mandatory for completion if the client no longer wishes to apply for care.

Question: Add 'No care type under the Act'	
	NB: This question will be dithered out and blocked for completion until all IAT mandatory questions are completed AND the assessor selects the 'finalise IAT and continue to support plan' button. This is to ensure that a system generated IAT outcome is displayed but assessors can select 'No care type under the Act' prior to accepting or overriding the IAT outcome if relevant.
Pre-populated information	No
Response guidance	Context: • Where a **comprehensive assessment** has occurred, however, the client has withdrawn their application or not applied for care, a recommendation of 'No care type under the Act' can be added to the support plan. • This enables an assessor to finalise the assessment and support plan, without needing to submit it to the Assessment Delegate for approval.

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Associated people

The associated people section of the support plan provides assessors with the opportunity to identify the people who will be helping the client to meet their goals, or who may be assisting in providing support.

Question: People associated with support plan	
Response options	Add person
Question rules	**Base question** that is not mandatory to complete
Pre-populated information	No
Response guidance	Context: • The assessor should indicate who is involved in the support plan. • Including the people and/or organisations who are involved in the support plan:

Question: People associated with support plan	
	○ Assists the client in setting and achieving goals and enables these to be made known to all involved in the client's care and service provision. ○ Encourages the client to be actively involved. ○ Manages long-term service delivery in a clear, concise way. ○ Provides an essential checklist to ensure continuity of service delivery. ○ Encourages a team approach. ○ Increases client and carer awareness of support services available, and how and when to access them. ○ Facilitates monitoring of the client's health and social wellbeing. <u>Consider and record:</u> • The person(s) name, their relationship to the client and their contact details. • Whether the person has been involved in the support planning process. • Whether the client has consented to giving the person a copy of their support plan. • Whether they have been provided with a copy of the support plan.

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Review

Question: Schedule a review	
Response options	Select date from a calendar
Question rules	**Base question** that is not mandatory to complete
Pre-populated information	No
Response guidance	<u>Context:</u> • This refers to the date the assessor intends to review the client's support plan. <u>Consider and record:</u>

Question: Schedule a review	
	• The date a review of the client's support plan should occur.

Question: Reason for review	
Response options	Textbox for written response
Question rules	**Base question** that is not mandatory to complete and will only appear if a schedule a review date is completed.
Pre-populated information	No

Response guidance	<u>Context:</u>
	• A review by an assessor will look at the following aspects:
	  ○ The reason a review has been requested and its impact on the client's existing assessment information and support plan.
	  ○ The appropriateness of the services in meeting the client's goals.
	  ○ Any new goals for the client, and associated referral(s) for service.
	  ○ The appropriateness of setting another review date or an end date for service delivery.
	
	<u>Consider and record:</u>
	• The reason for scheduling a review of the client's support plan.

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Appendix A – list of health conditions

Category	Code	Condition
No health conditions present	0000	No health conditions present
Certain infectious & parasitic diseases	0101	Tuberculosis
	0102	Poliomyelitis
	0103	HIV/AIDS
	0104	Diarrhoea & gastroenteritis of presumed infectious origin
	0105	Chronic viral hepatitis
	0199	Other infectious & parasitic diseases n.o.s or n.e.c (includes leprosy, listeriosis, scarlet fever, meningococcal infection, septicaemia, viral meningitis)
Neoplasms (tumours/cancers)	0201	Head & neck cancer
	0202	Stomach cancer
	0203	Colorectal (bowel) cancer
	0204	Lung cancer
	0205	Skin cancer
	0206	Breast cancer
	0207	Prostate cancer
	0208	Brain cancer
	0209	Lymphoma
	0210	Leukaemia
	0211	Other malignant tumours n.o.s or n.e.c
	0212	Liver cancer
	0213	Gynaecological cancer (includes ovarian, endometrial/uterine, cervical cancers)
	0214	Kidney cancer
	0215	Bladder cancer
	0216	Pancreatic cancer
	0217	Myeloma (includes multiple myeloma)
	0299	Other neoplasms (includes benign tumours & tumours of uncertain or unknown behaviour)
Diseases of the blood & blood forming organs & immune mechanism	0301	Anaemia (includes pernicious anaemia)
	0302	Haemophilia
	0303	Immunodeficiency disorder (excluding AIDS)
	0399	Other diseases of blood & blood forming organs & immune mechanism n.o.s. or n.e.c (includes hemochromatosis, scleroderma)
Endocrine, nutritional & metabolic disorders	0401	Disorders of the thyroid gland (includes iodine-deficiency syndrome, hypothyroidism, hyperthyroidism, thyroiditis)
	0402	Diabetes mellitus—Type 1 (IDDM)
	0403	Diabetes mellitus—Type 2 (NIDDM)

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Category	Code	Condition
	0404	Diabetes mellitus—other specified/unspecified/unable to be specified
	0405	Malnutrition
	0406	Nutritional deficiencies
	0407	Obesity
	0408	High cholesterol
	0499	Other endocrine, nutritional & metabolic disorders n.o.s or n.e.c (includes hypoparathyroidism, Cushing's syndrome, Addison's disease)
Mental & behavioural disorders	0500	Dementia in Alzheimer's disease
	0501	Dementia in Alzheimer's disease with early onset (<65 yrs)
	0502	Dementia in Alzheimer's disease with late onset (>65 yrs)
	0503	Dementia in Alzheimer's disease, atypical or mixed type
	0504	Dementia in Alzheimer's disease, unspecified
	0510	Vascular dementia
	0511	Vascular dementia of acute onset
	0512	Multi-infarct dementia
	0513	Subcortical vascular dementia
	0514	Mixed cortical & subcortical vascular dementia
	0515	Other vascular dementia
	0516	Vascular dementia—unspecified
	0520	Dementia in other diseases classified elsewhere
	0521	Frontotemporal dementia
	0522	Dementia in Creutzfeldt-Jakob disease
	0523	Dementia in Huntington's disease
	0524	Dementia in Parkinson's disease
	0525	Dementia in human immunodeficiency virus (HIV) disease
	0526	Dementia in other specified diseases classified elsewhere
	0530	Other dementia
	0531	Alcoholic dementia
	0532	Unspecified dementia (includes presenile & senile dementia)
	0540	Delirium
	0541	Delirium not superimposed on dementia
	0542	Delirium superimposed on dementia
	0543	Other delirium
	0544	Delirium–unspecified
	0550	Psychoses & depression/mood affective disorders
	0551	Schizophrenia
	0552	Depression/Mood affective disorders
	0553	Other psychoses (includes paranoid states, hallucinations)
	0560	Neurotic, stress related & somatoform disorders
	0561	Phobic & anxiety disorders (includes agoraphobia, panic disorder)

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Category	Code	Condition
	0562	Nervous tension/stress
	0563	Obsessive-compulsive disorder
	0564	Other neurotic, stress related & somatoform disorders
	0570	Intellectual & developmental disorders
	0572	Other developmental disorders (includes autism, Rett's syndrome, Asperger's syndrome, developmental learning disorders, specific developmental disorders of speech and language, specific developmental disorder of motor function (e.g. dyspraxia))
	0580	Other mental & behavioural disorders
	0581	Mental and behavioural disorders due to alcohol & other psychoactive substance use (includes alcoholism, Korsakov's psychosis (alcoholic))
	0582	Adult personality & behavioural disorders
	0583	Speech impediment (i.e. stuttering/stammering)
	0584	Lewy Body dementia
	0585	Cognitive impairment n.o.s
	0586	Post-traumatic stress disorder
	0599	Other mental & behavioural disorders n.o.s or n.e.c (includes harmful use of non-dependent substances e.g. laxatives analgesics, antidepressants, eating disorders e.g. anorexia nervosa, bulimia nervosa, mental disorders not otherwise specified)
Diseases of the nervous system	0601	Meningitis & Encephalitis (excluding 'viral')
	0602	Huntington's disease
	0603	Motor neurone disease
	0604	Parkinson's disease (includes Parkinson's disease, secondary Parkinsonism)
	0605	Transient cerebral ischaemic attacks (T.I.A.s)
	0606	Brain disease/disorders (includes senile degeneration of brain n.e.c, degeneration of nervous system due to alcohol, Schilder's disease)
	0607	Multiple sclerosis
	0608	Epilepsy (includes seizures)
	0609	Muscular dystrophy
	0610	Cerebral palsy
	0611	Paralysis—non-traumatic (includes hemiplegia, paraplegia, quadriplegia, tetraplegia & other paralytic syndromes, e.g. diplegia & monoplegia; excludes spinal cord injury code1699)
	0612	Chronic/post-viral fatigue syndrome
	0613	Shingles (Zoster) and/or postherpetic neuralgia
	0614	Peripheral Neuropathy
	0615	Normal pressure hydrocephalus

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Category	Code	Condition
	0699	Other diseases of the nervous system n.o.s or n.e.c (includes dystonia, migraines, headache syndromes, sleep disorders e.g. sleep apnoea & insomnia, Bell's palsy, myopathies, dysautonomia, progressive supranuclear palsy, restless legs syndrome)
Diseases of the eye & adnexa	0701	Cataracts
	0702	Glaucoma
	0703	Blindness (both eyes, one eye, one eye & low vision in other eye)
	0704	Poor vision (low vision both eyes, one eye, unspecified visual loss)
	0705	Macular degeneration
	0799	Other diseases of the eye & adnexa n.o.s or n.e.c (includes conjunctivitis, dry eyes)
Disease of the ear & mastoid process	0801	Ménière's disease (includes Ménière's syndrome, vertigo)
	0802	Deafness/hearing loss
	0899	Other diseases of the ear & mastoid process n.o.s or n.e.c (includes disease of external ear, otitis media, mastoiditis and related conditions, myringitis, otosclerosis, tinnitus)
Diseases of the circulatory system	0900	Heart disease
	0901	Rheumatic fever
	0902	Rheumatic heart disease
	0903	Angina
	0904	Myocardial infarction (heart attack)
	0905	Acute & chronic ischaemic heart disease (includes Coronary Artery Bypass Grafting (CABG))
	0906	Congestive heart failure (congestive heart disease)
	0907	Other heart diseases (acute pericarditis, acute and subacute endocarditis, cardiomyopathy, cardiac arrest, heart failure – unspecified)
	0910	Cerebrovascular disease
	0911	Subarachnoid haemorrhage
	0912	Intracerebral haemorrhage
	0913	Other intracranial haemorrhage
	0914	Cerebral infarction
	0915	Stroke (CVA)—cerebrovascular accident unspecified
	0916	Other cerebrovascular diseases (includes embolism, narrowing, obstruction & thrombosis of basilar, carotid, vertebral arteries and middle, anterior, cerebral arteries, cerebellar arteries not resulting in cerebral infarction)
	0920	Other diseases of the circulatory system
	0921	Hypertension (high blood pressure)
	0922	Hypotension (low blood pressure)
	0923	Abdominal aortic aneurysm

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Category	Code	Condition
	0924	Other arterial or aortic aneurysms (includes thoracic, unspecified, aneurysm of carotid artery, renal artery, unspecified)
	0925	Atherosclerosis
	0926	Atrial fibrillation
	0927	Venous thromboembolism (VTE) (includes deep vein thrombosis (DVT), pulmonary embolism)
	0928	Heart valve disorders (includes aortic stenosis, mitral valvular disorder)
	0999	Other diseases of the circulatory system n.o.s or n.e.c (includes other peripheral vascular disease, arterial embolism & thrombosis, other disorders of arteries & arterioles, diseases of capillaries, varicose veins, haemorrhoids, giant cell arteritis, Raynaud's)
Diseases of the respiratory system	1001	Acute upper respiratory infections (includes common cold, acute sinusitis, acute pharyngitis, acute tonsillitis, acute laryngitis, upper respiratory infections of multiple & unspecified sites)
	1002	Influenza & pneumonia
	1003	Acute lower respiratory infections (includes acute bronchitis, bronchiolitis & unspecified acute lower respiratory infections)
	1004	Other diseases of upper respiratory tract (includes respiratory allergies (excluding allergic asthma), chronic rhinitis & sinusitis, chronic diseases of tonsils & adenoids)
	1005	Chronic lower respiratory diseases (includes emphysema, chronic obstructive airways disease (COAD), chronic obstructive pulmonary disease (COPD), asthma)
	1006	Tracheostomy
	1099	Other diseases of the respiratory system n.o.s or n.e.c
Diseases of the digestive system	1101	Diseases of the intestine (includes stomach/duodenal ulcer, abdominal hernia (except congenital), enteritis, colitis, vascular disorders of intestine, diverticulitis, irritable bowel syndrome, diarrhoea, constipation)
	1102	Diseases of the peritoneum (includes peritonitis)
	1103	Diseases of the liver (includes alcoholic liver disease, toxic liver disease, fibrosis and cirrhosis of liver)
	1104	Gastrointestinal stoma (includes gastrostomy, jejunostomy (PEG/PEJ), ileostomy, colostomy)
	1199	Other diseases of the digestive system n.o.s or n.e.c (includes diseases of oral cavity, salivary glands and jaws, oesophagitis, gastritis and duodenitis, cholecystitis, other diseases of gallbladder, pancreatitis, coeliac disease, reflux)
Diseases of the skin &	1201	Skin & subcutaneous tissue infections (includes impetigo, boil, cellulitis)
	1202	Skin allergies (dermatitis & eczema)

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Category	Code	Condition
subcutaneous tissue	1299	Other diseases of the skin & subcutaneous tissue n.o.s or n.e.c (includes wounds, urticarial, erythema, radiation-related disorders, disorders of skin appendages, leg ulcers, pressure areas/ulcers)
Diseases of the musculoskeletal system & connective tissue	1301	Rheumatoid arthritis
	1302	Other arthritis & related disorders (includes arthrosis, Paget's Disease)
	1303	Deformities of joints/limbs—acquired
	1304	Back problems—dorsopathies (includes scoliosis, sciatica)
	1305	Other soft tissue/muscle disorders (includes rheumatism, lupus, polymyalgia rheumatica)
	1306	Osteoporosis
	1307	Osteoarthritis
	1308	Gout
	1399	Other disorders of the musculoskeletal system & connective tissue n.o.s or n.e.c (includes osteomyelitis)
Diseases of the genitourinary system	1401	Kidney & urinary system (bladder) disorders (includes nephritis renal failure, cystitis; excludes urinary tract infection & incontinence)
	1402	Urinary tract infection
	1403	Stress/urinary incontinence (includes stress, overflow, reflex & urge incontinence)
	1404	Urinary diversion (ileal conduit), urostomy
	1499	Other diseases of the genitourinary system n.o.s or n.e.c (includes prostate, breast and menopause disorders, vaginal prolapse, benign prostatic hypertrophy)
Congenital malformations, deformations & chromosomal abnormalities	1501	Spina bifida
	1502	Deformities of joints/limbs—congenital
	1503	Down's syndrome
	1504	Other chromosomal abnormalities
	1505	Congenital brain damage/malformation
	1599	Other congenital malformations & deformations n.o.s or n.e.c
Injury, poisoning & certain other consequences of external causes	1601	Injuries to the head (includes injuries to ear, eye, face, jaw, acquired brain damage)
	1602	Injuries to arm/hand/shoulder (includes, dislocations, sprains & strains)
	1603	Injuries to leg/knee/foot/ankle/hip (includes dislocations, sprains & strains)
	1604	Amputation of the finger/thumb/hand/arm/shoulder—traumatic
	1605	Amputation of toe/ankle/foot/leg—traumatic
	1606	Fracture of neck (includes cervical spine & vertebra)
	1607	Fracture of rib(s), sternum & thoracic spine (includes thoracic spine & vertebra)

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Category	Code	Condition
	1608	Fracture of lumbar spine & pelvis (includes lumbar vertebra, sacrum, coccyx, sacrum)
	1609	Fracture of shoulder, upper arm & forearm (includes clavicle, scapula, humerus, radius, ulna)
	1610	Fracture at wrist & hand level
	1611	Fracture of femur (includes hip (neck of femur))
	1612	Fracture of lower leg & foot
	1613	Poisoning by drugs, medicaments & biological substances (includes systemic antibiotics, hormones, narcotics, hallucinogens, analgesics, antipyretics, antirheumatics, antiepileptic, antiparkinsonism drugs, includes overdose of the above substances)
	1614	Non-traumatic amputation (includes surgical amputation)
	1699	Other injury, poisoning & consequences of external causes n.o.s or n.e.c (including all other injuries to the body, spinal cord injury, multiple fractures, unspecified dislocations, sprains, strains, fractures, burns, frostbite, toxic effects of substances of nonmedical source, complications of surgical & medical care, joint replacements, THR/TKR)
Symptoms & signs n.o.s or n.e.c	1701	Abnormal blood-pressure reading, without diagnosis
	1702	Cough
	1703	Breathing difficulties/shortness of breath
	1704	Pain
	1705	Nausea & vomiting
	1706	Dysphagia (difficulty in swallowing)
	1707	Bowel/faecal incontinence
	1708	Unspecified urinary incontinence
	1709	Retention of urine
	1710	Jaundice (unspecified)
	1711	Disturbances of skin sensation (includes pins & needles, tingling skin)
	1712	Rash & other nonspecific skin eruption
	1713	Abnormal involuntary movements (includes abnormal head movements, tremor unspecified, cramp & spasm, twitching n.o.s)
	1714	Abnormalities of gait & mobility (includes ataxic & spastic gait, difficulty in walking n.e.c)
	1715	Falls (frequent with unknown aetiology)
	1716	Disorientation (confusion)
	1717	Amnesia (memory disturbance, lack or loss)
	1718	Dizziness & giddiness (light-headedness, vertigo n.o.s)
	1719	Restlessness & agitation
	1720	Grief and loss
	1721	Irritability & anger

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Category	Code	Condition
	1722	Hostility
	1723	Physical violence
	1724	Slowness & poor responsiveness
	1725	Speech & voice disturbances (includes aphasia, dysphasia)
	1726	Headache
	1727	Malaise & fatigue (includes general physical deterioration, lethargy and tiredness)
	1728	Blackouts, fainting, seizure
	1729	Oedema n.e.c (includes fluid retention n.o.s)
	1730	Symptoms & signs concerning food & fluid intake (includes loss of appetite, excessive eating & thirst, abnormal weight loss & gain)
	1799	Other symptoms & signs n.o.s or n.e.c (includes gangrene, haemorrhage from respiratory passages, reflux, disturbances of smell & taste, enlarged lymph nodes, illness n.o.s)
	1899	Has other health condition not elsewhere specified

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Appendix B – pre-population from previous NSAF assessment

Responses to the below NSAF questions and supplementary assessment tools will pre-populate responses for the below IAT questions, if this pre-population option is selected when commencing an assessment.

		NSAF assessment type			
NSAF section	**NSAF question**	**HSA**	**CA**	**IAT section**	**IAT question**
Assessment Details	Assessment information collected from	YES	YES	Assessment Details	Assessment information collected from
Assessment Details	Professions of those who participated in the client assessment	NO	YES	Assessment Details	Professions of those who participated in the client assessment
Assessment Details	What is the key circumstance that has triggered client/representative	YES	YES	Reason for Assessment	What is the key circumstance that has triggered contact?
Social domain Carer Profile	Name	YES	YES	Carer Profile	Carer details
Social domain Carer Profile	Details of support being provided	YES	YES	Carer Profile	Typical hours per day carer provides help
Social domain Client as carer	Client is providing support to someone else	YES	YES	Carer Profile	Client is providing support to someone else
Social domain Client as carer	Name	YES	YES	Carer Profile	Name of person being cared for

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		NSAF assessment type			
NSAF section	NSAF question	HSA	CA	IAT section	IAT question
Social domain Client as carer	Details of person	YES	YES	Carer Profile	Describe the person the client is supporting
Social domain Sustainability of caring relationships	Sustainability of the caring relationship without additional support	YES	YES	Carer profile	Sustainability of the caring relationships without additional support
Social domain Sustainability of caring relationships	Respite	YES	YES	Carer Profile	Are there formal and/or informal respite arrangements in place?
Social domain Sustainability of caring relationships	Emergency care plan	YES	YES	Carer Profile	Is there emergency care plan in place?
Social domain Sustainability of caring relationships	Emergency care plan details	YES	YES	Carer Profile	Emergency care plan details
Physical Domain Observations	General observations of client	YES	YES	Function	General observations of client
Physical Domain Observations	Health literacy difficulties	YES	YES	Function	Health literacy difficulties
Physical Domain Observations	Health literacy difficulties details	YES	YES	Function	Health literacy difficulties details

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		NSAF assessment type			
NSAF section	NSAF question	HSA	CA	IAT section	IAT question
Physical Domain Function	Get to places out of walking distance	YES	YES	Function	Get to places out of walking distance
Physical Domain Function	Get to places out of walking distance details (including support received)	YES	YES	Function	Get to places out of walking distance details (including support received)
Physical Domain Function	Go shopping (assuming transportation)	YES	YES	Function	Go shopping (assuming transportation)
Physical Domain Function	Go shopping details (including support received)	YES	YES	Function	Go shopping details (including support received)
Physical Domain Function	Prepare meals	YES	YES	Function	Prepare meals
Physical Domain Function	Prepare meals details (including support received)	YES	YES	Function	Prepare meals details (including support received)
Physical Domain Function	Undertake housework	YES	YES	Function	Undertake housework
Physical Domain Function	Undertake housework details (including support received)	YES	YES	Function	Undertake housework details (including support received)
Physical Domain Function	Take medicine	YES	YES	Function	Take medicine

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		NSAF assessment type			
NSAF section	NSAF question	HSA	CA	IAT section	IAT question
Physical Domain Function	Take medicine details (including support received)	YES	YES	Function	Take medicine details (including support received)
Physical Domain Function	Handle money	YES	YES	Function	Handle money
Physical Domain Function	Handle money details (including support received)	YES	YES	Function	Handle money details (including support received)
Physical Domain Function	Walk	YES	YES	Function	Walk
Physical Domain Function	Walk details (including support received)	YES	YES	Function	Walk details (including support received)
Physical Domain Function	Take a bath or shower	YES	YES	Function	Take a bath or shower
Physical Domain Function	Take a bath or shower details (including support received)	YES	YES	Function	Take a bath or shower details (including support received)
Physical Domain Function	Dressing	YES	YES	Function	Dressing
Physical Domain Function	Dressing details (including support received)	YES	YES	Function	Dressing details (including support received)

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		NSAF assessment type			
NSAF section	NSAF question	HSA	CA	IAT section	IAT question
Physical Domain Function	Eating	YES	YES	Function	Eating
Physical Domain Function	Eating details (including support received)	YES	YES	Function	Eating details (including support received)
Physical Domain Function	Transfers	YES	YES	Function	Transfers
Physical Domain Function	Transfers details (including support received)	YES	YES	Function	Transfers details (including support received)
Physical Domain Function	Toileting – Bladder	YES	YES	Function	Toileting – Bladder
Physical Domain Function	Toileting – Bowels	YES	YES	Function	Toileting – Bowels
Physical Domain Function	Summary of Function	YES	YES	Function	Summary of Function
Physical Domain Function	DEMMI	NO	YES	Function	DEMMI
Physical Domain Function	RUIS	NO	YES	Function	RUIS

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		NSAF assessment type			
NSAF section	NSAF question	HSA	CA	IAT section	IAT question
Physical Domain Function	RFIS	NO	YES	Function	RFIS
Physical Domain Physical Health	Taking medication	YES	YES	Medical and Medications	Is the client taking medications?
Physical Domain Physical Health	Medication details	NO	YES	Medical and Medications	Medication details
Physical Domain Physical Health	Sensory concerns	YES	YES	Physical and Personal Health and Frailty	Sensory concerns
Physical Domain Physical Health	Vision impairment	YES	YES	Physical and Personal Health and Frailty	Vision impairment
Physical Domain Physical Health	Hearing impairment	YES	YES	Physical and Personal Health and Frailty	Hearing impairment
Physical Domain Physical Health	Speech concerns	YES	YES	Physical and Personal Health and Frailty	Speech concerns
Physical Domain Physical Health	Sensory concerns details	YES	YES	Physical and Personal Health and Frailty	Sensory concerns details
Physical Domain Physical Health	Slips, trips and falls	YES	YES	Physical and Personal Health and Frailty	Slips, trips and falls

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		NSAF assessment type			
NSAF section	NSAF question	HSA	CA	IAT section	IAT question
Physical Domain Physical Health	Slips, trips and falls details	YES	YES	Physical and Personal Health and Frailty	Slips, trips and falls details
Physical Domain Physical Health	Driving	YES	YES	Function	Driving
Physical Domain Personal Health	Oral health	YES	YES	Physical and Personal Health and Frailty	Oral health
Physical Domain Personal Health	Oral health details	YES	YES	Physical and Personal Health and Frailty	Oral health details
Physical Domain Personal Health	Skin conditions	YES	YES	Physical and Personal Health and Frailty	Skin conditions
Physical Domain Personal Health	Pain	YES	YES	Physical and Personal Health and Frailty	Pain
Physical Domain Personal Health	Pain details	YES	YES	Physical and Personal Health and Frailty	Pain details
Physical Domain Personal Health	Sleep	YES	YES	Physical and Personal Health and Frailty	Sleep
Physical Domain Personal Health	Sleep details	YES	YES	Physical and Personal Health and Frailty	Sleep details

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		NSAF assessment type			
NSAF section	NSAF question	HSA	CA	IAT section	IAT question
Physical Domain Personal Health	Alcohol use details	YES	YES	Physical and Personal Health and Frailty	Alcohol use details
Medical Domain Healthcare Connections	Recent GP visits and health checks	YES	YES	Medical and Medications	Recent GP visits and health checks
Medical Domain Healthcare Connections	Recent GP visits and health checks details	YES	YES	Medical and Medications	Recent GP visits and health checks details
Medical Domain Health Conditions	Health condition	YES	YES	Medical and Medications	Health condition
Medical Domain Health Conditions	Allergies and/or sensitivities	YES	YES	Medical and Medications	Allergies and/or sensitivities
Medical Domain Health Conditions	Allergies and/or sensitivities details	YES	YES	Medical and Medications	Allergies and/or sensitivities details
Psychological Domain Cognition	Changes in personality	YES	NO	Behaviour	Changes in personality
Psychological Domain Cognition	Changes in personality details	YES	NO	Behaviour	Changes in personality details
Psychological Domain Cognition	Changes in behaviour	YES	NO	Behaviour	Changes in behaviour

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		NSAF assessment type			
NSAF section	NSAF question	HSA	CA	IAT section	IAT question
Psychological Domain Psychosocial	Feelings of loneliness or social isolation	YES	NO	Reason for Assessment	Feelings of loneliness or social isolation
Psychological Domain Psychosocial	KICA Cog	NO	YES	Cognition	KICA Cog
Psychological Domain Psychosocial	KICA Carer	NO	YES	Cognition	KICA Carer
Psychological Domain Psychological	Short term memory problems	NO	YES	Cognition	Short term memory problems
Psychological Domain Psychological	Long term memory problems	NO	YES	Cognition	Long term memory problems
Psychological Domain Psychological	Impaired judgement	NO	YES	Cognition	Impaired judgement
Psychological Domain Psychological	Delirium	NO	YES	Cognition	Delirium
Psychological Domain Psychological	At risk behaviour	NO	YES	Cognition	At risk behaviour
Psychological Domain Psychological	Aggressive behaviour - Verbal	NO	YES	Behaviour	Aggressive behaviour - Verbal

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		NSAF assessment type			
NSAF section	NSAF question	HSA	CA	IAT section	IAT question
Psychological Domain Psychological	Aggressive behaviour - Physical	NO	YES	Behaviour	Aggressive behaviour - Physical
Psychological Domain Psychological	Resistive behaviour	NO	YES	Behaviour	Resistive behaviour
Psychological Domain Psychological	Agitation	NO	YES	Behaviour	Agitation
Psychological Domain Psychological	Hallucinations/delusions	NO	YES	Behaviour	Hallucinations/delusions
Psychological Domain Psychological	Wandering	NO	YES	Behaviour	Wandering
Psychological Domain Psychological	Disturbed sleep/insomnia	NO	YES	Psychological	Disturbed sleep/insomnia
Psychological Domain Psychological	Anxiety	NO	YES	Psychological	Anxiety
Psychological Domain Psychological	Symptoms of depression	NO	YES	Psychological	Symptoms of depression
Psychological Domain Psychological	Apathy	NO	YES	Psychological	Apathy

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		NSAF assessment type			
NSAF section	NSAF question	HSA	CA	IAT section	IAT question
Psychological Domain Psychological	Loneliness	NO	YES	Psychological	Loneliness
Psychological Domain Psychological	Social isolation	NO	YES	Psychological	Social isolation
Psychological Domain Psychological	Confusion	NO	YES	Cognition	Confusion
Psychological Domain Psychological	Disorientation - time	NO	YES	Cognition	Disorientation - time
Psychological Domain Psychological	Disorientation - place	NO	YES	Cognition	Disorientation - place
Psychological Domain Psychological	Disorientation - people	NO	YES	Cognition	Disorientation - people
Psychological Domain Psychological	Psychological details	NO	YES	Psychological	Assessor psychological observations
Psychological Domain Psychological	Geriatric Depression Scale	NO	YES	Psychological	Geriatric Depression Scale
Home and Personal Safety	General observations of the home environment	YES	YES	Home & Personal Safety	General observations of the home environment

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		NSAF assessment type			
NSAF section	**NSAF question**	**HSA**	**CA**	**IAT section**	**IAT question**
Home and Personal Safety	Home safety type	YES	YES	Home & Personal Safety	Home safety equipment client has
Home and Personal Safety	Home maintenance (including gardening)	YES	YES	Home & Personal Safety	Home maintenance (including gardening)
Home and Personal Safety	Home maintenance support received (formal/informal)	YES	YES	Home & Personal Safety	There is help for client's home maintenance
Linking Support	Client is living in inadequate housing or with insecure tenure or is already homeless which compromises their health, wellbeing and ability to remain living in the community.	YES	YES	Home & Personal Safety	Client is living in inadequate housing or with insecure tenure or is already homeless which compromises their health, wellbeing and ability to remain living in the community.
Linking Support	There is risk of, or suspected or confirmed abuse.	YES	YES	Support Considerations	There is risk of, or suspected or confirmed abuse.
Linking Support	Client is exposed to risks or is self-neglecting of personal care and/or safety and likely to cause harm to themselves and others.	YES	YES	Support Considerations	Client is exposed to risks or is self-neglecting of personal care and/or safety and likely to cause harm to themselves and others.
Linking Support	Risk of Vulnerability - Cohort	YES	YES	Support Considerations	Does the client identify as:
Assessment Details		**NSAF assessment type**			Assessment information collected from

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		NSAF assessment type			
NSAF section	NSAF question	HSA	CA	IAT section	IAT question
Assessment Details					Professions of those who participated in the client assessment
Assessment Details	Assessment information collected from	YES	YES	Assessment Details	What is the key circumstance that has triggered contact?
Social domain Carer Profile	Professions of those who participated in the client assessment	NO	YES	Assessment Details	Carer details
Social domain Carer Profile	What is the key circumstance that has triggered client/representative	YES	YES	Reason for Assessment	Typical hours per day carer provides help
Social domain Client as carer	Name	YES	YES	Carer Profile	Client is providing support to someone else
Social domain Client as carer	Details of support being provided	YES	YES	Carer Profile	Name of person being cared for
Social domain Client as carer	Client is providing support to someone else	YES	YES	Carer Profile	Describe the person the client is supporting
Social domain Sustainability of caring relationships	Name	YES	YES	Carer Profile	Sustainability of the caring relationships without additional support

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		NSAF assessment type			
NSAF section	NSAF question	HSA	CA	IAT section	IAT question
Social domain Sustainability of caring relationships	Details of person	YES	YES	Carer Profile	Are there formal and/or informal respite arrangements in place?
Social domain Sustainability of caring relationships	Sustainability of the caring relationship without additional support	YES	YES	Carer profile	Is there emergency care plan in place?
Social domain Sustainability of caring relationships	Respite	YES	YES	Carer Profile	Emergency care plan details
Physical Domain Observations	Emergency care plan	YES	YES	Carer Profile	General observations of client
Physical Domain Observations	Emergency care plan details	YES	YES	Carer Profile	Health literacy difficulties
Physical Domain Observations	General observations of client	YES	YES	Function	Health literacy difficulties details

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