

My Aged Care Assessor Portal - Organisation Administrator User Guide

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1. Background and Overview of the Assessor Portal

1.1 Purpose of the Guide

This guide explains how assessment organisation administrators use the My Aged Care Assessor Portal.

It is intended for organisations that conduct aged care needs assessments and/or residential aged care funding assessments.

The guide provides an overview of the portal and explains the tasks that users with the **Administrator** role can perform, including:

- Managing outlet information
- Creating and maintaining staff accounts
- Requesting changes to contractual information.

This guide does not include:

- Detailed instructions for setting up organisations in the **Relationship Authorisation Manager (RAM)**. You can find these on the [RAM website](#).
- Detailed instructions for functions performed by users with the **Team Leader**, **Assessor**, **Delegate**, or **Delegate Support** roles. These are available on the department's [My Aged Care - Assessor Portal Resources](#) webpage.
- Detailed instructions for residential funding assessment functions. For these, refer to the [Aged Care Assessor Application User Guide](#).

1.2 Privacy requirements

Assessment organisations must comply with the requirements of the **Privacy Act 1988**, including the [Australian Privacy Principles \(APPs\)](#), when handling personal information in the assessor portal.

The **Privacy Act** sets out how organisations must collect, use, store, disclose, access and correct personal information.

Aged care needs assessors must also comply with section 534 of the **Aged Care Act 2024** when using the assessor portal.

1.3 Introduction to using the Assessor Portal

The assessor portal is used to:

- Create and manage staff records
- Activate the Aged Care Assessor App
- Check where clients are in their My Aged Care journey.
- Manage referrals for assessments issued by the My Aged Care contact centre, Aged Care Specialist Officers, through the [My Aged Care website](#) or via the [General Practitioner \(GP\) e-Referral function](#).
- Create, access and update client records, including setting up supporters and others in the client's support network
- Conduct triage and assessments using the Integrated Assessment Tool (IAT)
- Develop client support plans

- Support Delegation processes (after home support and comprehensive assessments)
- Refer clients for aged care services or further assessment
- View the progress of Residential Aged Care (RAC) Funding Assessments
- Access forms and reports
- View and manage tasks and notifications, including from other My Aged Care portals
- Find a Service Provider and view their information.

Assessment organisations can also use the offline Aged Care Assessor App or a printed version of the IAT to support aged care needs assessments conducted in circumstances where the assessor does not have access to the internet.

For further information about the Aged Care Assessor App, refer to the [Aged Care Assessor Application User Guide](#).

The printed version of the IAT can be downloaded from the Reports and documents tab in the assessor portal.

! myID is the primary login option for assessors to securely access and use the assessor portal.

To access the assessor portal, staff must have an individual myID and be authorised to act on behalf of their organisation through the [Relationship Authorisation Manager \(RAM\)](#) service.

VANguard Federated Authentication Service (VANguard FAS) is an alternative login option for organisations with corporate network structure that includes a Single Sign On System (for example, Active Directory Federation Service).

For more information regarding accessing the assessor portal, visit [Logging in to the Aged Care Systems](#).

1.4 How and when to direct people to My Aged Care

To access government-funded aged care services, a person must have a My Aged Care client record.

Clients can create their own record. The My Aged Care Contact Centre, Aged Care Specialist Officers (ACSOs) and assessors can also create records for people seeking aged care services.

If a person does not already have a client record, aged care needs assessors and Residential Aged Care (RAC) funding assessors can register them in My Aged Care.

Assessment organisations can only receive assessment referrals for clients who are registered in My Aged Care. For example, while assessing a client at home, an assessor may identify that the client's partner or cohabitant also needs an assessment but is not yet registered with My Aged Care. In this situation, the assessor must first register the partner or cohabitant before arranging an assessment for them.

Needs assessors and RAC funding assessors can register and self-refer clients for assessment in the assessor portal.

For detailed instructions, refer to [My Aged Care – Assessor Portal User Guide 1 – Registering and referring clients for assessments](#).

2. Assessor Portal access

To access the assessor portal, each staff member must have a My Aged Care user account linked to a supported third-party authentication service.

For information about setting up user accounts and signing in to the system, refer to [Logging in to the Aged Care Systems](#).

3. Assessment organisation configuration in the Assessor Portal

People with the **Organisation Administrator** role in the assessor portal are responsible for keeping information about their organisation's assessment services accurate and up to date.

3.1 Overview

! The department creates and manages outlets on behalf of assessment organisations.
If your organisation's structure changes, contact the department so they can update the organisation details.

In My Aged Care, Each **Service Area** consists of one or more **Aged Care Planning Regions (ACPRs)**. The number of outlets assigned to an organisation depends on the ACPRs within the Service Area where it operates.

Following are the examples of organisation structures in My Aged Care:

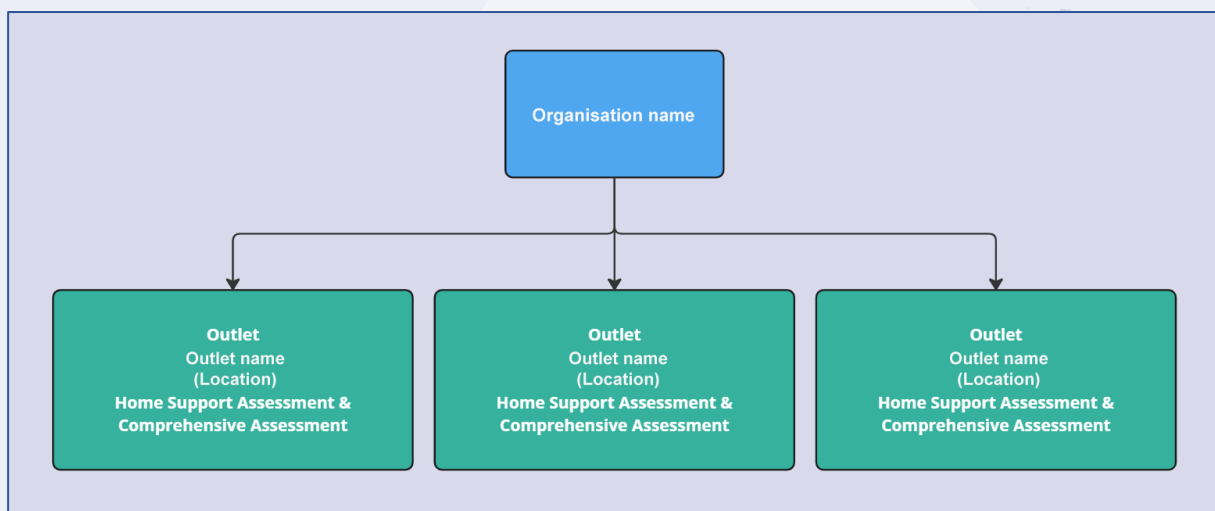
Example 1:

If an organisation called **ABC Ltd.** provides aged care needs assessments (Home Support Assessments and Comprehensive Assessments) in the **NSW 1 Service Area**, it will have three outlets:

- Northern Sydney
- Western Sydney
- Inner West

These outlets correspond to the three ACPRs that make up the NSW 1 Service Area.

Example 1 - An organisation with three outlets



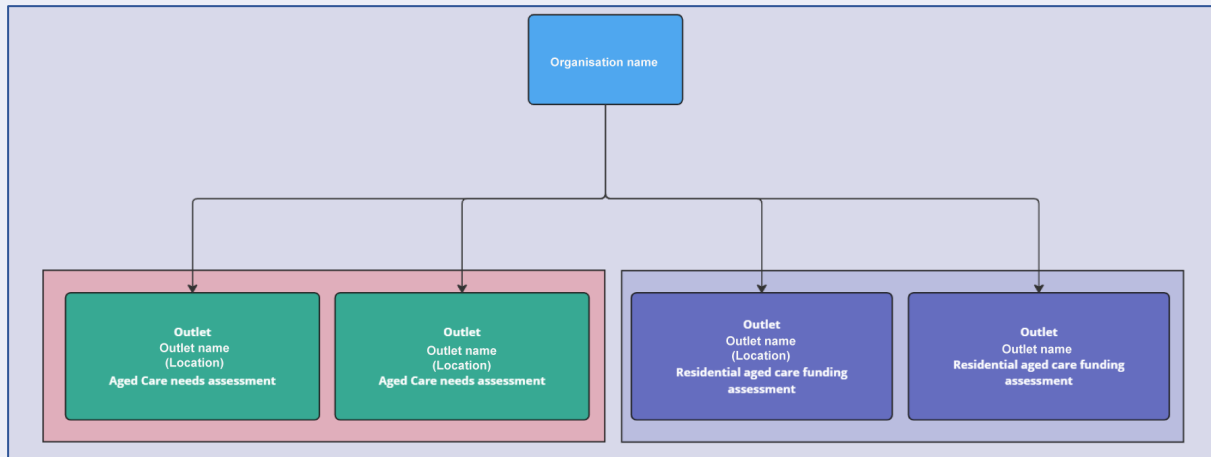
Example 2:

If **BCD Ltd.** provides both aged care needs assessments (Home Support Assessments and Comprehensive Assessments) and Residential Aged Care (RAC) funding assessments in **VIC 4**, it will have four outlets:

- Two outlets for aged care needs assessments (Home Support and Comprehensive)
- Two outlets for RAC funding assessments (Hume and Gippsland)

These outlets reflect the ACPRs within the VIC 4 Service Area.

Example 2 - An organisation with two Aged Care needs assessment outlets and two Residential aged care assessment outlets

**Outlet names**

The department uses a standard naming convention for all outlets. Organisation Administrators must not change outlet names.

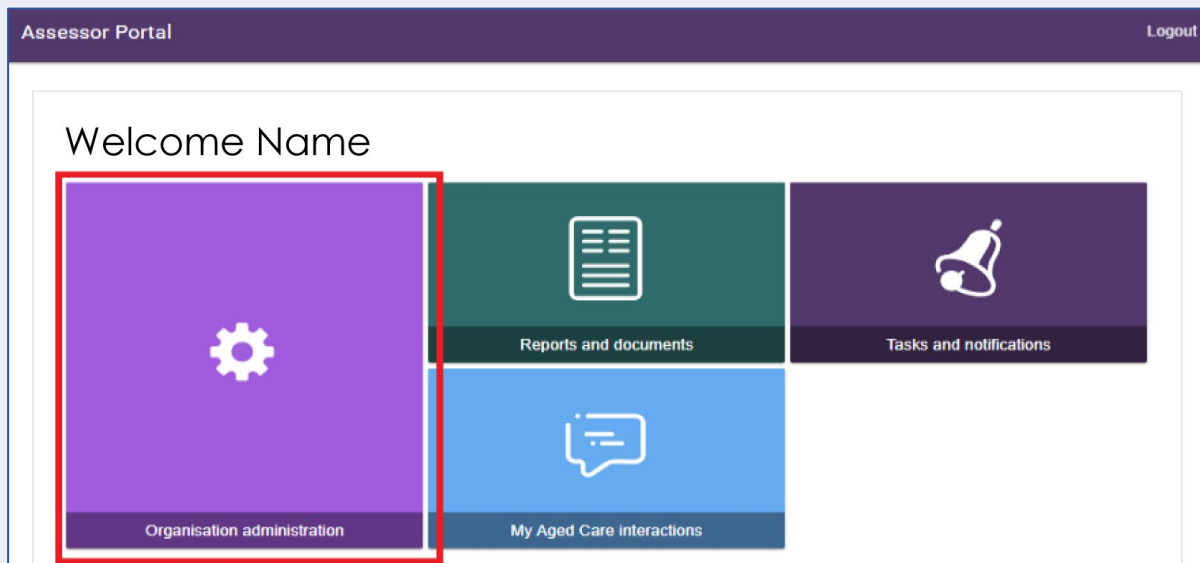
The department creates:

- One outlet for each ACPR that delivers aged care needs assessment services (Home Support Assessments and Comprehensive Assessments). The outlet name follows this format: **Organisation Name - ACA - ACPR Region**
- One outlet for each ACPR that delivers Residential Aged Care (RAC) funding assessment services. The outlet name follows this format: **Organisation Name - RAC - ACPR Region**.

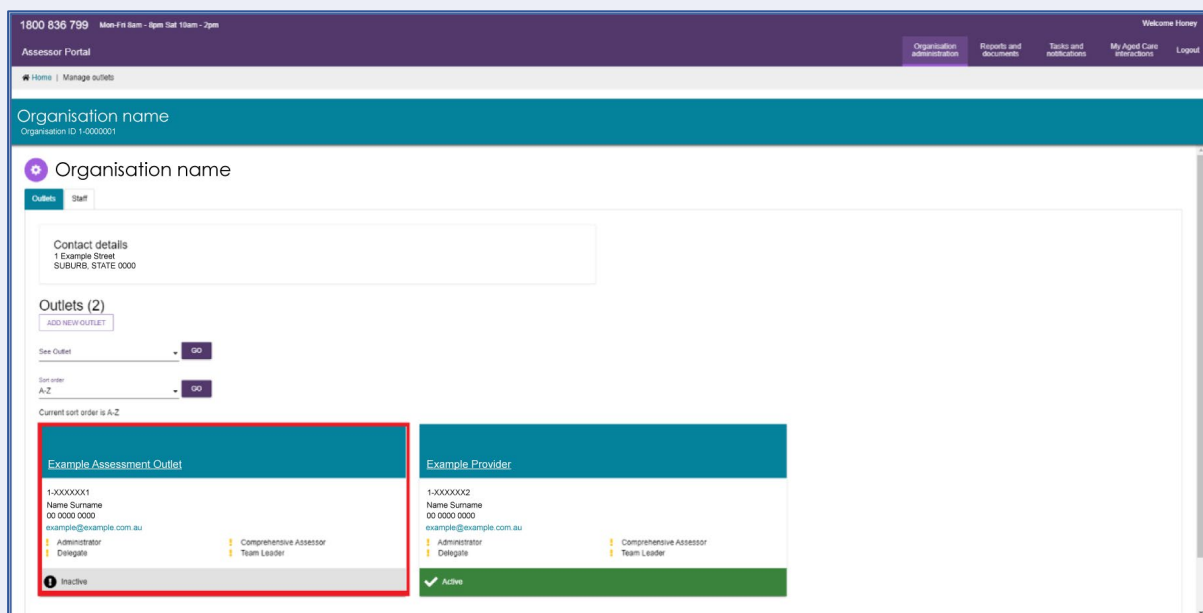
3.2 Activating outlets

Follow these steps to activate an outlet:

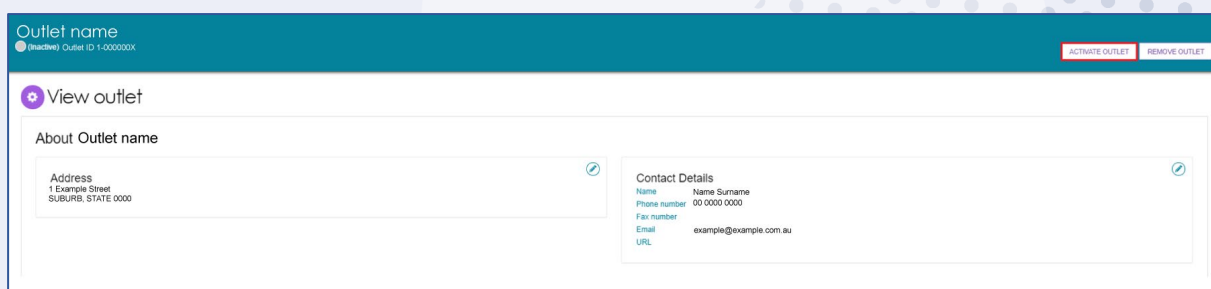
1. From the homepage, select **Organisation administration**.



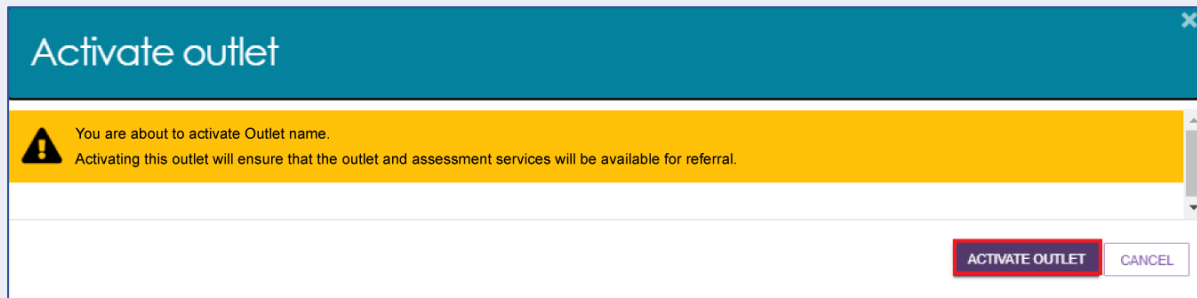
2. Locate the inactive outlet and select the outlet name on the **Outlet** card.



3. Select **Activate Outlet**.

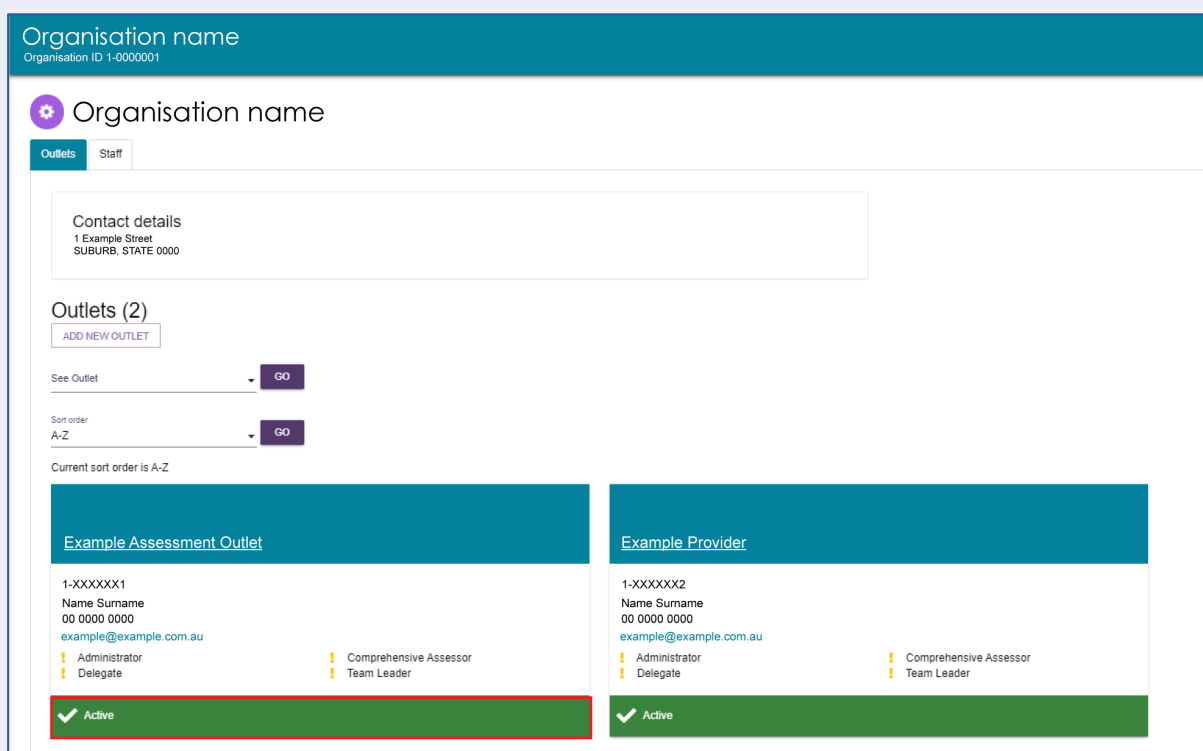


4. When the warning message appears, select **Activate Outlet** again to confirm.



5. The outlet is now active. You can view its status on the **View Outlet** page and the **Outlet Administration** page.

Once the outlet is active, its details will appear in the service finders on the My Aged Care website, and contact centre staff can send assessment referrals to the outlet.



3.3 Staff roles

For more information, refer to *Nominating an Organisation Administrator in Aged Care Systems* in the [Logging in to Aged Care Systems](#) guide.

The organisation administrator assigns roles to staff members. They can also assign the administrator role to other staff who help set up and maintain organisation information in the assessor portal.

Assign roles based on each staff member's responsibilities and after they have completed all required training.

! If you have more than one role, your access applies across all outlets you can access in the assessor portal.

3.4 Homepage views by role type

The options you see on the assessor portal homepage depend on the role or roles assigned to you. If you have more than one role, your homepage displays the functions available for all your assigned roles.

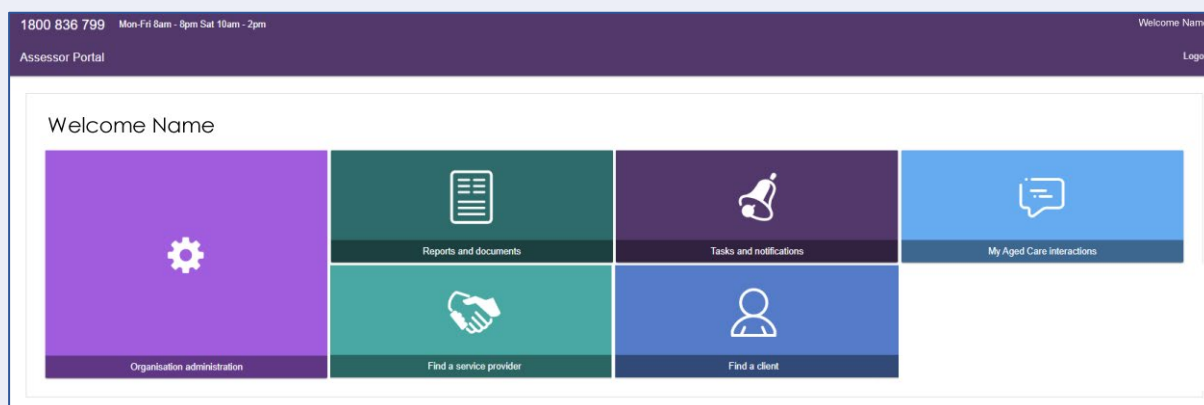
3.4.1 Administrator homepage

Users with an Administrator role at the organisation level can view and manage information for the entire organisation in the portal.

Users with an Administrator role for one or more outlets can only view and manage information for the outlets assigned to them.

If you log in to the assessor portal as an Administrator, your homepage displays the following tiles:

- Organisation administration
- Reports and documents
- Find a service provider (Not available for residential funding assessment organisations)
- Find a client (Not available for residential funding assessment organisations)
- Tasks and notifications
- My Aged Care interactions.

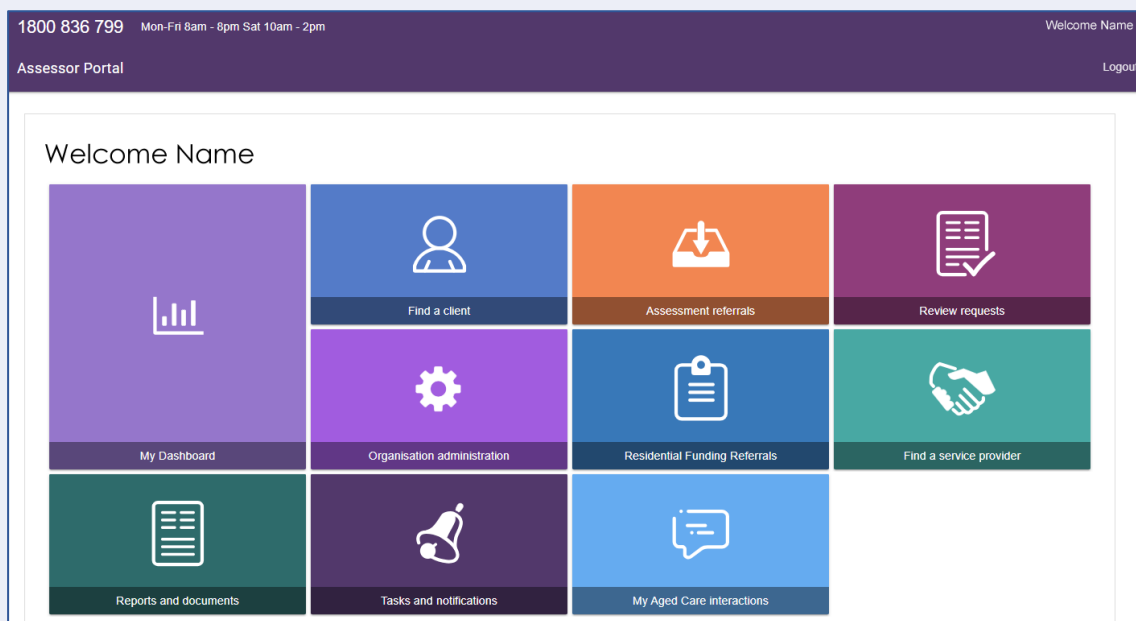


3.4.2 Team Leader homepage

People with the Team Leader role manage assessment referrals and assign assessment reviews.

If you log in to the assessor portal as a Team Leader, your homepage displays the following tiles:

- My Dashboard
- Find a client
- Assessment referrals, including Residential Funding Referrals
- Review Requests
- Organisation administration
- Find a service provider
- Reports and documents
- Tasks and notifications
- My Aged Care interactions.

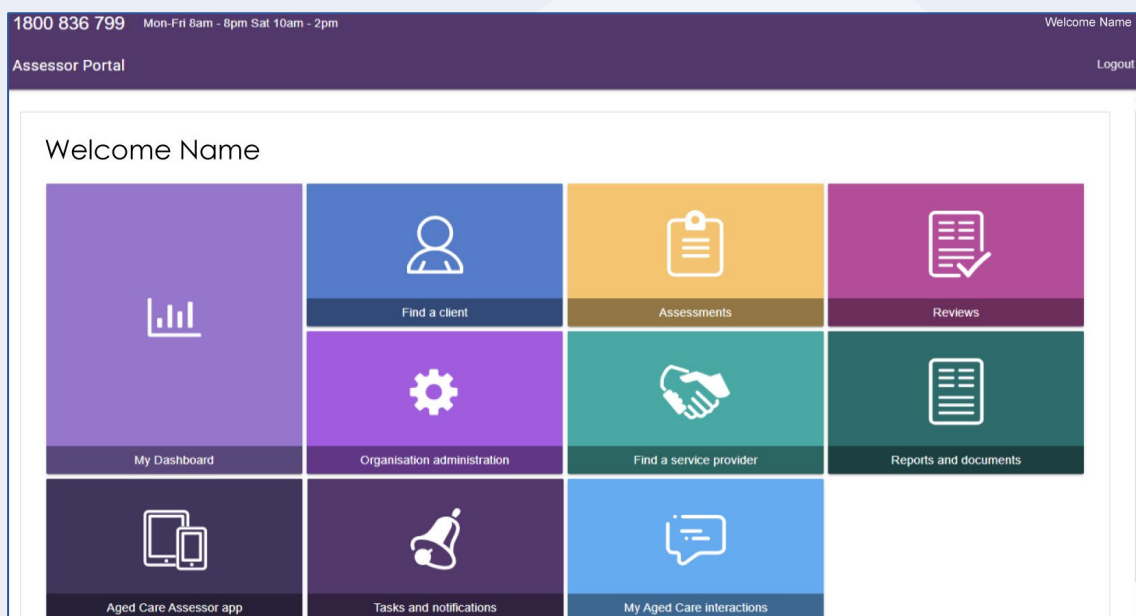


3.4.3 Needs Assessor homepage

People with a Needs Assessor role register new clients and complete client assessments.

If you log in to the assessor portal as a Needs Assessor, your homepage displays the following tiles:

- My Dashboard
- Find a client
- Assessments
- Reviews
- Find a service provider
- Reports and documents
- Aged Care Assessor App
- Tasks and notifications
- My Aged Care interactions.



3.4.4 Triage Delegate homepage

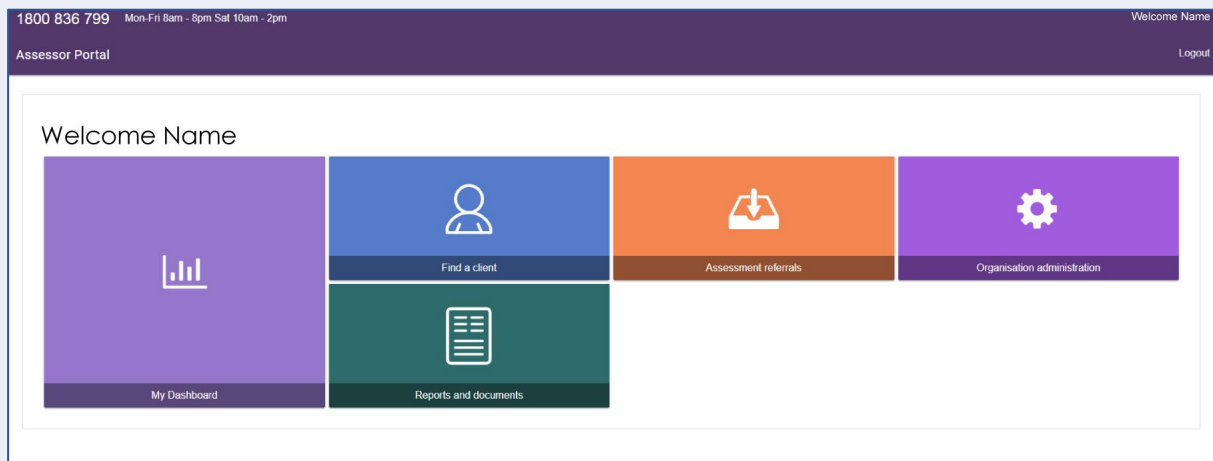
! Organisation Administrators cannot assign delegate roles. Instead, a Needs Assessor, Team Leader, or Operational Manager must submit an application for these roles.

For more information about applying for delegate roles, refer to [My Aged Care Assessor Portal User Guide 12 – Managing delegate roles](#).

People with a Triage Delegate role complete triage activities.

If you log in to the assessor portal as a Triage Delegate, your homepage displays the following tiles:

- My Dashboard
- Find a client
- Assessment referrals
- Organisation administration
- Reports and documents.



3.4.5 Assessment Delegate homepage

! Organisation Administrators cannot assign delegate roles. Instead, a Needs Assessor, Team Leader, or Operational Manager must submit an application for a delegate role.

Clinical Assessment Delegates can approve all service groups, classification types, and classification levels under the *Aged Care Act*.

Non-Clinical Assessment Delegates can only approve entry-level home support, Assistive Technology, and Home Modification services. These services have classification levels of CHSP Class, AT-CHSP, or HM-CHSP. They can also make decisions and initiate corrections for Home Support assessments only.

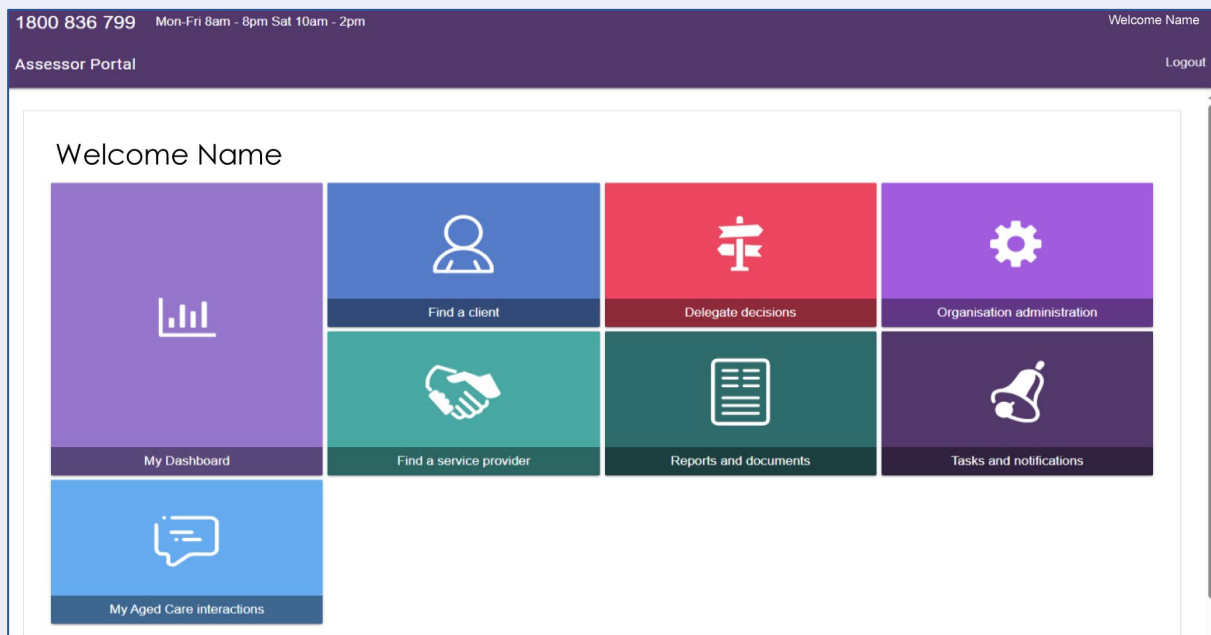
For information about Assessment Delegate changes, refer to 'Chapter 7: Delegations and Approvals under the Act' of the [My Aged Care Assessment Manual](#).

For information about applying for delegate roles, refer to [My Aged Care Assessor Portal User Guide 12 – Managing delegate roles](#).

People with an Assessment Delegate role make delegate decisions for services that require approval under the *Aged Care Act*.

If you log in to the assessor portal as an Assessment Delegate, your homepage displays the following tiles:

- Delegate decisions
- Find a client
- Find a service provider
- Reports and documents
- Tasks and notifications
- Organisation administration
- My Aged Care interactions.

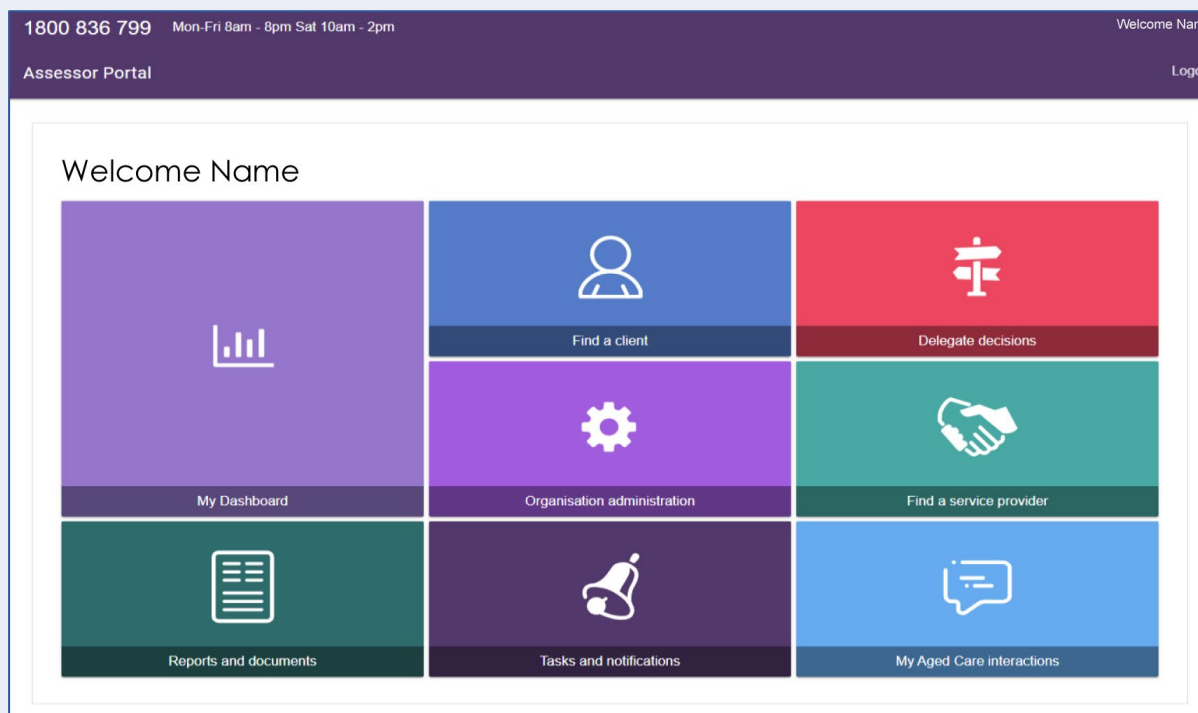


3.4.6 Assessment Delegate Support homepage

People with an Assessment Delegate Support role assist Assessment Delegates by generating, uploading, and printing Notices of Decision (approval and non-approval letters) and Referral Code Letters. They can also print client information from support plans and client records.

If you log in to the assessor portal as an Assessment Delegate Support user, your homepage displays the following tiles:

- Delegate decisions
- Find a client
- Organisation administration
- Find a service provider
- Reports and documents
- Tasks and notifications
- My Aged Care interactions.

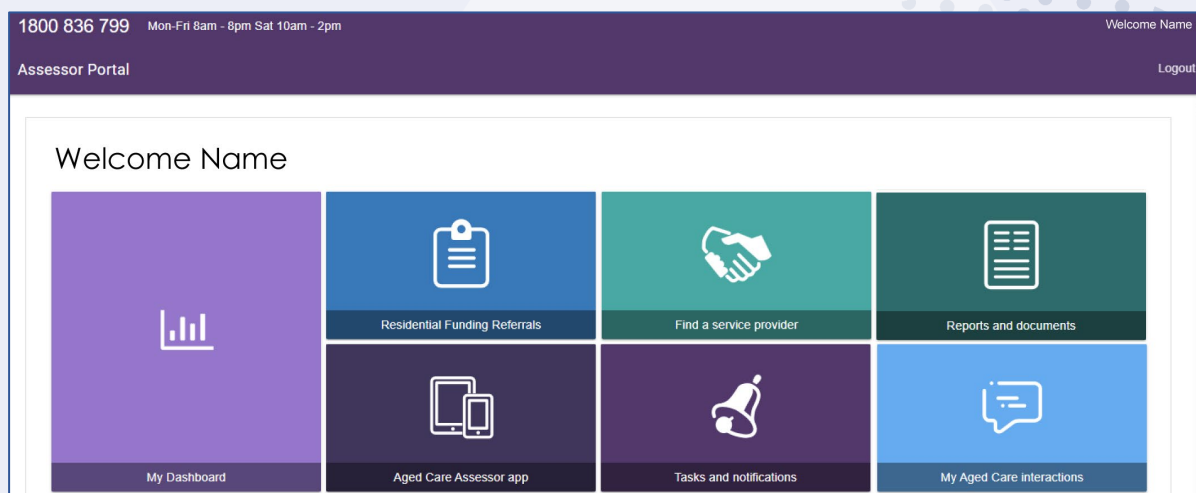


3.4.7 Residential Funding Assessor functions

People with a Residential Funding Assessor role can view the assessment referrals assigned to them, as well as referrals that have been closed. They can also accept and assign referrals.

If you log in to the assessor portal as a Residential Funding Assessor, your homepage displays the following tiles:

- Find a client
- Residential Funding Referrals
- Find a service provider
- Reports and documents
- Aged Care Assessor app
- Tasks and notifications
- My Aged Care interactions.

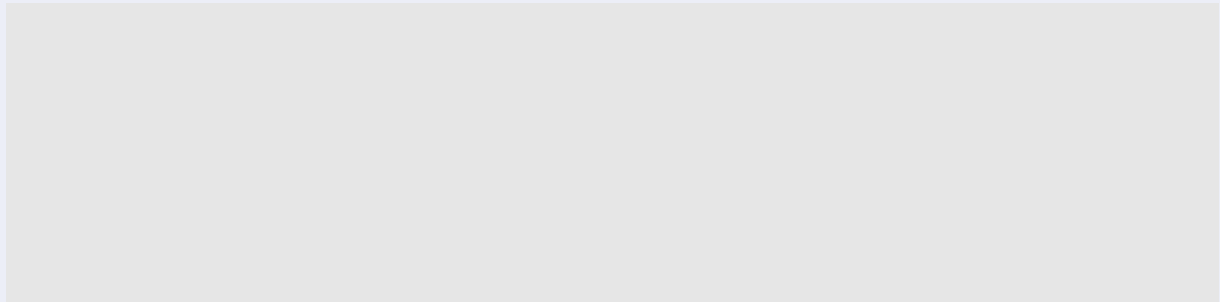


3.4.8 Residential Funding Team Lead functions

People with a Residential Funding Team Lead role can manage Residential Funding Referrals, generate reports and documents, find service providers, and perform other responsibilities related to their role.

If you log in to the assessor portal as a Residential Funding Team Lead, your homepage displays the following tiles:

- Residential Funding Referrals
- My Aged Care interactions
- Find a service provider
- Reports and documents
- Tasks and notifications.



4. Key functions by role type

Administrators create and manage staff accounts in the assessor portal.

Staff can have more than one role at the same time. These roles include:

- Administrator
- Team Leader
- Needs Assessor
- Residential Funding Assessor
- Residential Funding Assessor (Restricted)
- Triage Delegate
- Clinical Assessment Delegate
- Non-Clinical Assessment Delegate
- Assessment Delegate Support.

The following tables describe the main functions of each role in the assessor portal. They also explain the roles that other teams, such as the contact centre, play in a client's aged care journey.

The tables include both client-focused and organisation-focused responsibilities.

Client Focused Roles and Functions

Key Functions	Contact Centre	Administrator	Team Leader	Triage Delegate	Needs Assessor	RAC Funding Assessor	Assessment Delegate (clinical and non-clinical)	Assessment Delegate Support
View reports and documents		✓	✓	✓	✓	✓		
Manage staff accounts		✓						
Activate Aged Care Assessor app					✓	✓		
View Client Journey Tracker	✓		✓	✓	✓		✓	✓
Provision of aged care information	✓	✓	✓	✓	✓	✓	✓	✓
Register a client or support person	✓				✓ excluding Residential funding assessors)			
Self-Refer a client					✓ (limited)			
Search for and view a client record			✓	✓	✓		✓	✓
Screening	✓				✓ *			
Complete triage				✓	✓ **			
Referral for assessment	✓				✓			
Conduct assessment					✓			
Enter assessment information on the client record (including completing the support plan)					✓		✓	
Service matching and referrals	✓				✓			
Management of assigned of Residential referrals			✓ Residential Funding Assessor Team Leads only)					
Action referral & deliver services								
Accept and reject assessment referrals			✓					
View tasks and notifications		✓	✓	✓	✓	✓	✓	✓
Manage task and notification preferences		✓						

Client Focused Roles and Functions *continued...*

Key Functions	Contact Centre	Administrator	Team Leader	Triage Delegate	Needs Assessor	RAC Funding Assessor	Assessment Delegate (clinical and non-clinical)	Assessment Delegate Support
View and Reassign SaH notifications			✓					
Record completed tasks in the portal			✓		✓			
Approve Delegate decisions							✓	
Print client information for the Delegate							✓	✓
Assign & transfer support plan reviews			✓		✓			
Conduct Support Plan Reviews					✓			

*A needs assessor who self refers will complete the screening component.

**A needs assessor can complete Triage if supervised by a Triage Delegate.

*** A Delegate can edit decisions within 43 days.

Organisation Focussed Roles and Functions

Key Functions	Administrator Role	Team Leader Role	Needs assessor Role	Triage Delegate	Assessment Delegate Role (clinical and non-clinical)	Assessment Delegate Support Role	RAC funding assessor
View My Aged Care interactions	✓	✓	✓	✓	✓	✓	✓
Request a change to contractual information	✓						
Manage staff accounts: add, edit, deactivate and remove	✓						

4.1 Creating new staff accounts and assigning roles

The first time a staff member logs in to the assessor portal, they must follow the steps in [Logging in to the Aged Care Systems](#) on the department's website.

Follow these steps to create a new staff account:

1. On the **Organisation Administration** page, open the **Staff** tab and select **Add New Staff**.

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

Assessor Portal Logout

Home | Manage staff

Organisation name

Organisation ID 1-0000001

Organisation name

Outlets **Staff** Delegate Positions

Contact details

1 Example Street
SUBURB, STATE 0000

ADD NEW STAFF

2. Enter all mandatory fields, including:

- First name
- Last name
- Unique email address
- Contact number.

Indicate whether the staff member is accredited. Then assign one or more roles in the **Manage Roles** section.

Add staff member

Staff details

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

Title	Job title
First name *	Email *
Last name *	Contact numbers Only one contact number is required. *
Preferred name	Home ?
Clinical status	Work ?
	Mobile ?

Accreditation ?

Accredited *

☐ Yes

☐ No

Occupation ?

Occupation

Please enter details below:

Manage roles * ?

ASSIGN ROLES

Manage Qualifications ?

ADD QUALIFICATIONS

SAVE CANCEL

3. In **Manage Roles**, select the role or roles you want to assign and select **Save**.

Manage roles

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

Please select the role(s) *

☒ Administrator ☐ Team Leader

☐ Delegate Support ☐ Comprehensive Assessor

☐ Home Support Assessor

Add, Cease or Replace Delegate Roles through [Delegate Positions](#)

Clinical Assessment Delegate ?

Triage Delegate ?

Non-Clinical Assessment Delegate ?

SAVE CANCEL

- ! Organisation Administrators cannot assign delegate roles. Instead, a Needs Assessor, Team Leader, or Operational Manager must submit an application for a delegate role.

For information about applying for delegate roles, refer to [My Aged Care Assessor Portal User Guide 12 – Managing delegate roles](#).

- !
- Each staff member can have either the **Residential Funding Assessor** role or the **Residential Funding Assessor (Restricted)** role. They cannot hold both roles at the same time.
 - Staff with a **Residential Funding Assessor** or **Residential Funding Assessor (Restricted)** role can also be assigned the **Residential Funding Team Lead** role.
 - In line with the **Single Assessment System Workforce Statement of Requirements**, you must record the assessor's **Australian Health Practitioner Regulation Agency (AHPRA) ID** and **discipline** in the **Accreditation** section of the **Add Staff Member** page when assigning any of the following roles:
 - Residential Funding Assessor
 - Residential Funding Assessor (Restricted)
 - Clinical Needs Assessor (Comprehensive Assessor)
 - Team Leader.

Accreditation ?

Staff member has completed the appropriate accreditation and other training requirements as part of their contractual obligations and as directed by the Department and relevant to their roles and responsibilities. Comprehensive Assessors must hold current unrestricted registration with the Australian Health Practitioners Regulation Agency (AHPRA) or other relevant professional association, for example social workers must be registered by the Australian Association of Social Workers.

Accredited *

☒ Yes ☐ No

Learning management system ID

Expiry date

(e.g. dd/mm/yyyy)

To assign an Administrator role across the entire organisation, select **Organisation Level**, then select **Save Roles**. The system automatically applies these roles to all outlets.

Manage role - Administrator

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

Please select the level of the Administrator role*

☒ Organisation level ☐ Outlet level

BACK **SAVE ROLES** **CANCEL**

To assign a role to specific outlets only, select **Outlet Level**, choose the relevant outlets, then select **Save Roles**.

Manage role - Administrator

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

Please select the level of the Administrator role*

☐ Organisation level ☒ Outlet level

Please select outlets for Administrator role *

☐ Select all outlets

☐ Outlet name 1 - Suburb, STATE ☐ Outlet name 5 - Suburb, STATE

☐ Outlet name 2 - Suburb, STATE ☐ Outlet name 6 - Suburb, STATE

☐ Outlet name 3 - Suburb, STATE ☐ Outlet name 7 - Suburb, STATE

☐ Outlet name 4 - Suburb, STATE ☐ Outlet name 8 - Suburb, STATE

BACK **SAVE ROLES** **CANCEL**

4. A green confirmation banner appears when the roles are saved successfully. The **Manage Roles** section displays the assigned roles and any associated outlets.

Select **Save** to continue.

Manage roles * ?

MANAGE ROLES

Assigned roles ?	Assigned outlets
Administrator	Outlet name

SAVE **CANCEL**

✓ Role(s) saved successfully.

5. The new staff member now appears in the **Staff** section of your organisation.
- The staff card shows the staff member's accreditation status and assigned roles.

Organisation name

Outlets **Staff** Delegate Positions

Contact details
1 Example Street
SUBURB, STATE 0000

ADD NEW STAFF

Staff (18)

Filter by

Sort order
A-Z

Current sort order is A-Z

Name SURNAME Staff member ID: AA-XXXXXX1 📞 Work: 00 0000 0000 📧 Email: example@example.com.au Non-accredited Roles • Administrator ✓ Active	Name SURNAME Staff member ID: AA-XXXXXX2 📞 Home 00 0000 0000 📧 Email: example@example.com.au Accredited Clinical Status: Clinical Roles • Comprehensive Assessor ✓ Active	Name SURNAME Staff member ID: AA-XXXXXX3 📞 Home 00 0000 0000 📧 Email: example@example.com.au Non-accredited Clinical Status: Non-Clinical Roles • Team Leader • Triage Delegate ✓ Active
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4.2 Deactivate a staff account

Follow these steps to deactivate a staff account:

1. On the **Organisation Administration** page, open the **Staff** tab and select the staff member you want to deactivate.

Organisation name
Organisation ID 1-0000001

Staff (3)

Filter by

View status ☒ Active ☐ Outlet ☐ Staff name

View status is Active

Sort order
A-Z

Current sort order is A-Z

Name SURNAME Staff member ID: AA-XXXXXX1 📧 Email: example@example.com.au Non-accredited Roles Administrator ✓ Active	Name SURNAME Staff member ID: AA-XXXXXX2 📞 Mobile: 0000 000 000 📧 Email: example@example.com.au Accredited Roles Administrator ✓ Active	Name SURNAME Staff member ID: AA-XXXXXX3 📧 Email: example@example.com.au Non-accredited Roles Administrator ✓ Active
--	--	--

- On the **View Staff Member** page, select **Deactivate**.

- Select **Deactivate Account** to confirm.

If the staff member has any assigned assessments, the confirmation message will display these assessments before you deactivate the account.

4.3 Removing and reactivating a staff account

Inactive staff members who have been deactivated can be removed from organisations and outlets. Once removed, they no longer appear in the assessor portal.

Follow these steps to remove an inactive staff member:

- On the **Organisation Administration** page, open the **Staff** tab.

Select **Inactive** from the **View Status** drop-down list to display inactive staff members.

- Select the staff member you want to remove.

3. On the **View Staff Member** page, select **Remove** or **Reactivate**.



View staff member

Name SURNAME

(Inactive)

Staff member ID AA-XXXXXX1

Customer Service Supervisor

REACTIVATE
REMOVE

Contact details

Email name@email.com.au

Contact numbers 00 0000 0000 (work)

Clinical status Non-Clinical

Accreditation

Accredited Yes

Learning management system ID XX000001

Expiry date DD/MM/YYYY

Qualifications

Health related Degree or above Nursing

Diplomas and Certificates My Aged Care Assessor Training

Occupation

Nurse Registered Nurse

Organisation name - Location

• Delegate Support

4. Select **Remove** to remove the staff member from your staff list.

Remove staff member

You are about to remove Name SURNAME.

Doing so will remove this staff member from your list. Call the Contact Centre if you need to reactivate this account.

REMOVE
CANCEL

! If you need to restore access for a staff member who has been removed, contact the **My Aged Care Provider and Assessor Helpline** on **1800 836 799**.

You cannot create a new portal user account using the same email address as a removed staff member.

4.4 Edit a staff account

Follow these steps to edit a staff account:

1. On the **Organisation Administration** page, open the **Staff** tab and select the staff member you want to edit.

Organisation name

Outlets **Staff** Delegate Positions

Contact details
1 Example Street
SUBURB, STATE 0000

[ADD NEW STAFF](#)

Staff (18)

Filter by

View status: **Active** | Outlet: | Staff name: |

View status is Active

[FILTER](#) [CLEAR](#)

Sort order: **A-Z** [GO](#)

Current sort order is A-Z

Name	Staff member ID	Home	Email	Accredited	Clinical Status
SURNAME	AA-XXXXXX1	00 0000 0000	example@example.com.au	Non-accredited	Roles
SURNAME	AA-XXXXXX1	00 0000 0000	example@example.com.au	Accredited	Clinical Status: Clinical
SURNAME	AA-XXXXXX1	00 0000 0000	example@example.com.au	Non-accredited	Clinical Status: Non-Clinical
SURNAME	AA-XXXXXX1	00 0000 0000	example@example.com.au	Accredited	Clinical Status: Clinical

2. On the **View Staff Member** page, select **Edit Staff Details**.

View staff member

Name SURNAME
● (Active)
Staff member ID: AA-XXXXXX1

[DEACTIVATE](#)

Contact details
Email: example@example.com.au
Contact numbers:

Accreditation
Accredited: No

Golden NT

Administrator

[EDIT STAFF DETAILS](#)

3. You can update staff details and roles at any time.

To change roles, select **Manage Roles** or the **Edit** (pencil) icon. Update the staff member's roles in the pop-up window, then select **Save**.


Edit staff member

Staff details

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

Title

Job title

First name *
Name

Email *
name.surname@aussiehealthcare.com.au

Last name *
Surname

Contact numbers
Only one contact number is required. *

Preferred name

Home ?

Clinical status
Non-Clinical

Work ?
0312345678

Mobile ?

Accreditation ?

Accredited *

☐ Yes
☒ No

Occupation ?

Occupation
Select one

Please enter details below:

Manage roles * ?

MANAGE ROLES

Assigned roles ?	Assigned outlets	
Home Support Assessor	Aussie Healthcare - Darwin	 
Team Leader	Aussie Healthcare - Darwin	 

Manage Qualifications ?

ADD QUALIFICATIONS

SAVE

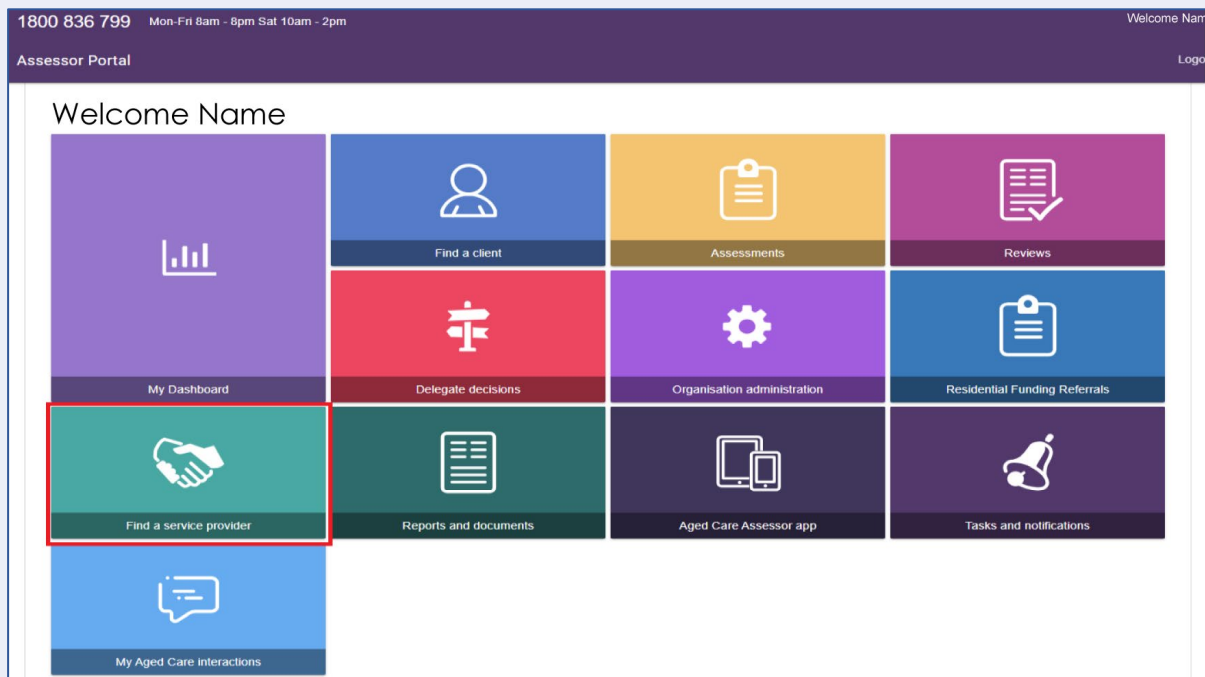
CANCEL

4.5 Find a service provider

The following roles can use the **Find a Service Provider** function in the assessor portal:

- Needs Assessor
- Team Leader
- Triage Delegate
- Clinical Assessment Delegate
- Non-Clinical Assessment Delegate
- Assessment Delegate Support.

Users assigned any of these roles can access the **Find a Service Provider** function from the assessor portal.



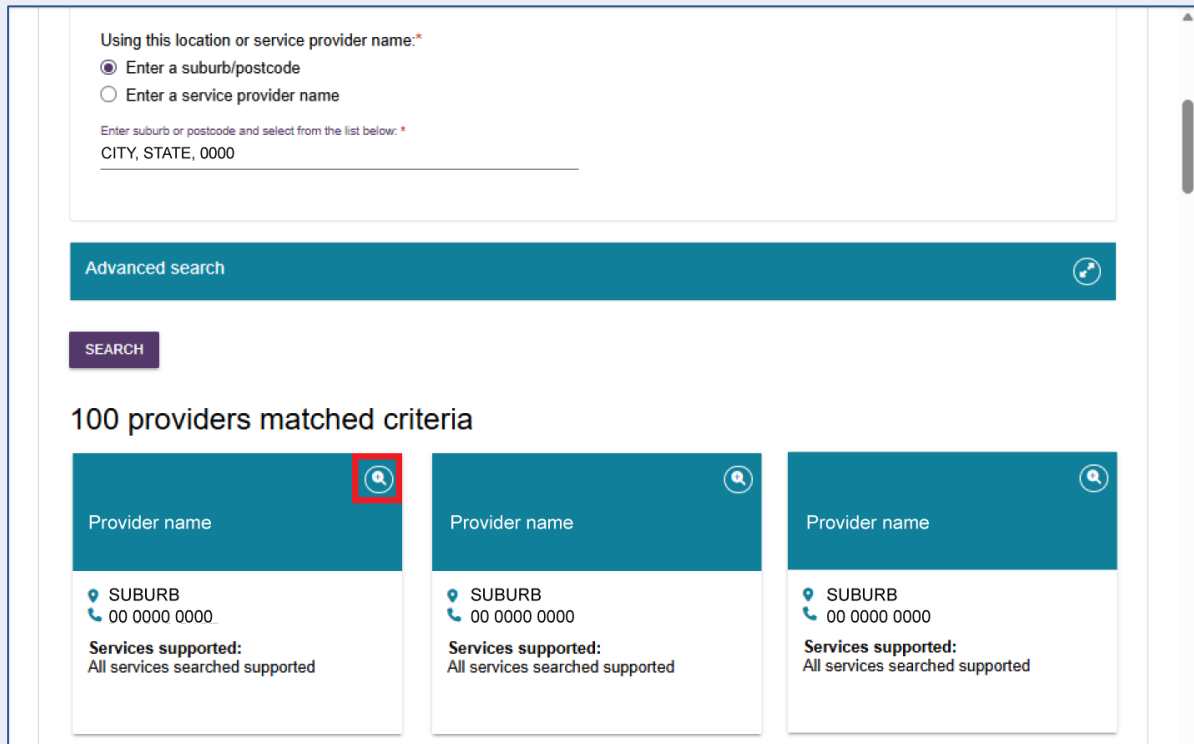
Search for providers by entering the category, service type, location, and verified specialisations. The search results appear below the search fields.

The screenshot shows the 'Find a service provider' search form. The form includes a header with the title 'Find a service provider' and a sub-header 'Home | Find a Service Provider'. Below the header, there is a section titled 'Locate these services:' with two dropdown menus: 'Select a category *' and 'Select a service type *'. Below these, there is a section titled 'Using this location or service provider name: *' with two radio buttons: 'Enter a suburb/postcode' and 'Enter a service provider name'. Below this, there is a section titled 'Preferred language chosen:' with a text input field for 'Preferred client language' and a plus icon. At the bottom of the form, there is a 'SEARCH' button.

Each provider's service card shows key information, including:

- Suburb
- Phone number
- Service availability
- Waitlist availability.

Each service card also includes a link to the [My Aged Care](#) website, where you can find additional information, such as the provider's compliance details. Select **Expand** on the service card to view more information about the provider.



Using this location or service provider name:*

☒ Enter a suburb/postcode

☐ Enter a service provider name

Enter suburb or postcode and select from the list below: *

CITY, STATE, 0000

Advanced search

SEARCH

100 providers matched criteria

Provider name	Provider name	Provider name
SUBURB 00 0000 0000 Services supported: All services searched supported	SUBURB 00 0000 0000 Services supported: All services searched supported	SUBURB 00 0000 0000 Services supported: All services searched supported

The provider's details open on a new page. You can also hover over any help icon to see additional information about a specific topic.

Information for Provider name

CLOSE

Provider name

✓ Commonwealth Government recognised organisation

Regulatory decisions are available here

Service groups and types

Assistive technology

Equipment and products

See services

Service type availability: Yes

Classification type: Ongoing, Short-term

Home modifications

Home adjustments

See services

Service type availability: Yes

Classification type: Short-term

Home support

Home maintenance and repairs

See services

Service type availability: Yes

Classification type: Ongoing, Short-term

Home or community general respite

See services

Service type availability: Yes

Classification type: Ongoing, Short-term

Meals

See services

Service type availability: Yes

Classification type: Ongoing, Short-term

Contact information

00 STREET NAME
SUBURB
STATE, 0000

Phone: 00 0000 0000

Fax: 00 0000 0000

Email: example@example.com.au

Website: www.example.com.au

Support at home pricing

Full Price List

Website

www.example.com.au

Pricing schedule

No attachment available

Specialisations

Specialisation Verifications

This outlet has no verified specialisations to display

Specialised services

Dementia

Respite care

Wellness and reablement

4.6 End of Month (EOM) reporting

Organisation Administrators and Team Leaders can generate a **BIP EOM Preparation Invoice Report** and send it to the department as supporting evidence for their End of Month (EOM) Assessment Invoice.

Follow these steps:

- From the assessor portal homepage, select **Reports and Documents**.

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

Welcome Name

Assessor Portal

Logout

Welcome Name

Organisation administration

Reports and documents

Tasks and notifications

My Aged Care interactions

2. Select BIP EOM Preparation Invoice Report.

Assessor Portal

Home | Reports and documents

Reports and documents

Reports Forms Links

My Reports

Name	Requested Date	Status
No Records found		

Reports List

Name	Description	Formats
BIP ACG Assessment Management Report		XLSX, PDF
BIP Assessment - Work In Progress Report		PDF
BIP EOM Invoice Report		XLSX
BIP EOM Preparation Invoice Report		PDF, XLSX

BUSINESS INTELLIGENCE REPORTS

3. On the **Generate Report** page:

- Select the correct **Outlet ID**.
- Enter the **start date** and **end date** for the reporting month.
- Select **XLSX** from the **Output Type** list.
- Select **Request Report**.

The system returns you to the **Reports and Documents** page, where the report appears under **My Reports**.

Generate report

Reports Forms Links

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

BIP EOM Preparation Invoice Report

Outlet ID: *
OUTLET ID

Start Date: *
01/08/2024

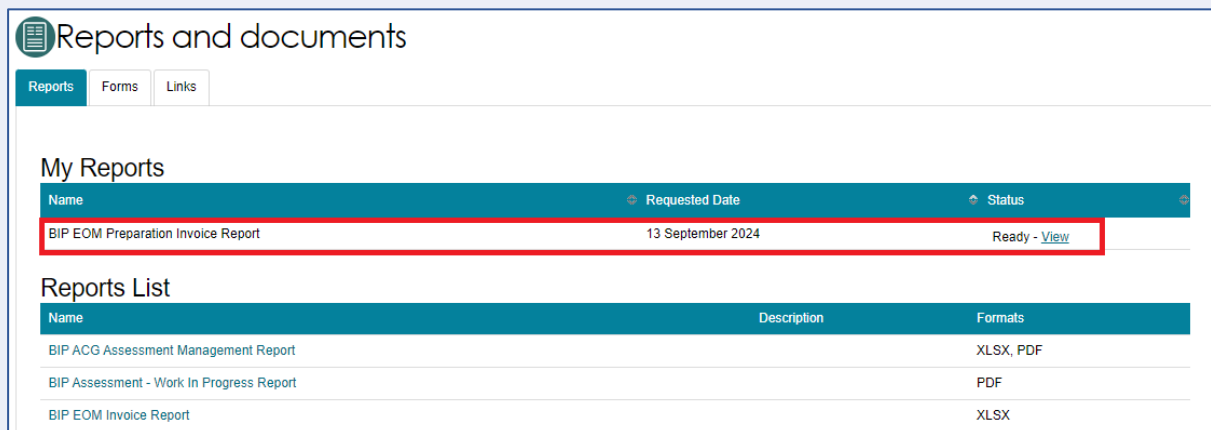
End Date: *
31/08/2024

Output Type: *
XLSX

REQUEST REPORT CANCEL

4. Select **View** to open the report.

The report status initially shows **Processing**. Once the report is ready, the status changes to **Ready - View**.

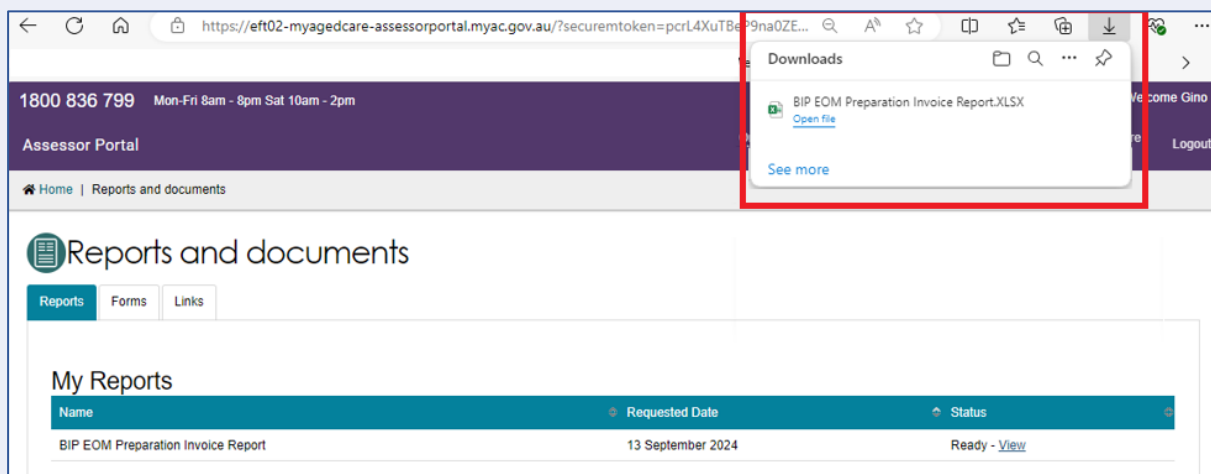


The screenshot shows the 'Reports and documents' page with tabs for Reports, Forms, and Links. Under 'My Reports', a table lists reports. The 'BIP EOM Preparation Invoice Report' is highlighted with a red box, showing a status of 'Ready - View'. Below this is a 'Reports List' table.

Name	Requested Date	Status
BIP EOM Preparation Invoice Report	13 September 2024	Ready - View

Name	Description	Formats
BIP ACG Assessment Management Report		XLSX, PDF
BIP Assessment - Work In Progress Report		PDF
BIP EOM Invoice Report		XLSX

5. Download the Excel file to your computer. To open it, select the **Open file** link from the **Downloads** pop-up in the top-right corner of your web browser.



This screenshot shows the same 'Reports and documents' page as before, but with a browser download pop-up visible in the top-right corner. The pop-up shows the file 'BIP EOM Preparation Invoice Report.XLSX' and an 'Open file' link, which is highlighted with a red box. The background page shows the report status as 'Ready - View'.

6. Review the report in Microsoft Excel.

The report shows the total number of assessments and includes details for each assessment, such as:

- Unique assessment ID (Event ID)
- Assessor who completed the assessment
- Unique client ID
- Date the assessment was completed
- Assessment type recorded at the triage stage
- Whether the assessment was completed in hospital.

EOM Preparation Invoice Report

Assessment Service
Completed home support and comprehensive assessments from 01/08/2024 to 31/08/2024
Service item - Location
 The following home support and comprehensive assessments were recorded as having been completed between 01/08/2024 to 31/08/2024
 Total Number of Assessments: 0 Home Support, 1 Comprehensive

Event ID	Assessor	Client ID	Date assessment	Triage Assessment	Service Item	NAPS Service	In-Hospital
1-XXXXXXX	Assessor name	XX00000000	#####	Comprehensive Assessment	Name of service item	00000	N

End of report

Date Generated: 13-09-2024 11:12:53

Page 1 of 1

For more information regarding reporting, refer to the [My Aged Care Assessment Manual](#).