Australian Government | myagedcare

Assessor Portal User Guide 1 - Registering and referring clients for assessment

This guide helps aged care needs assessors use the My Aged Care assessor portal or the Aged Care Assessor App to register clients and refer them for assessment.

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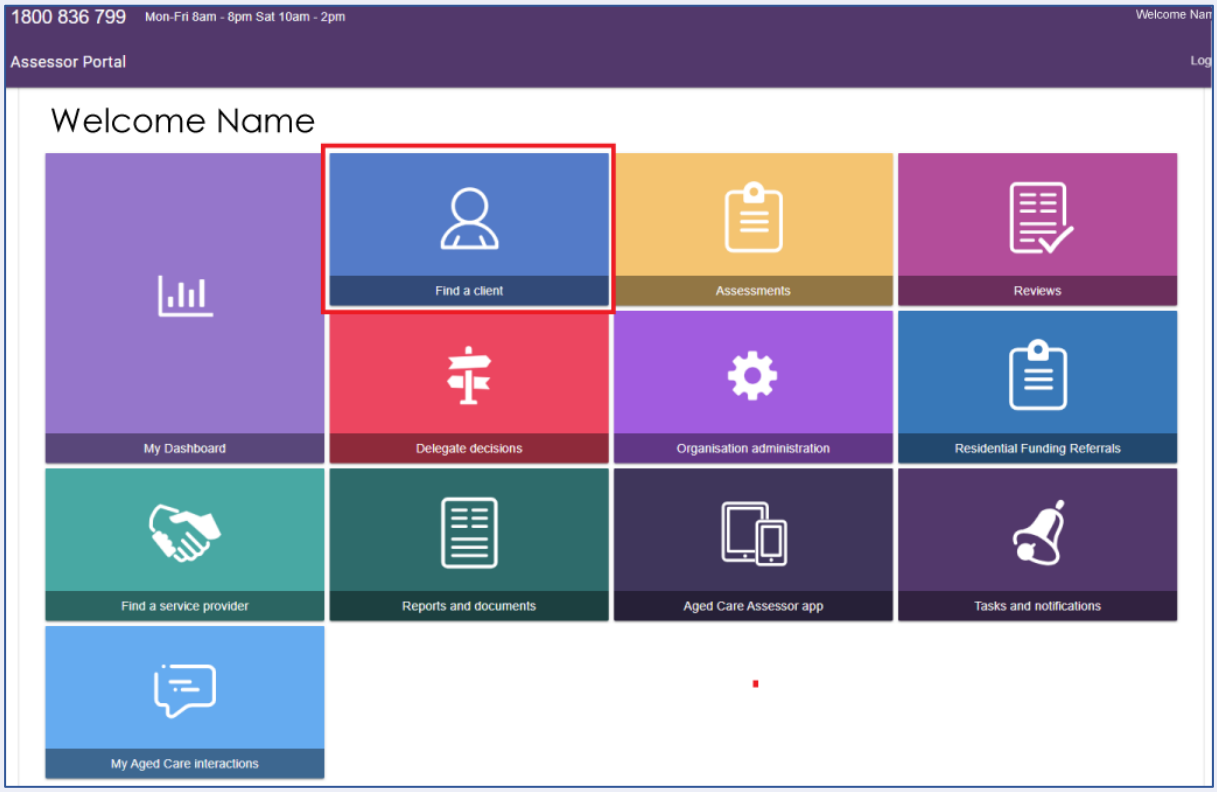
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Finding a client in the Portal

Before you register a person, you need to confirm that they do not already have a client record. Follow the steps below to determine if the client has an existing record.

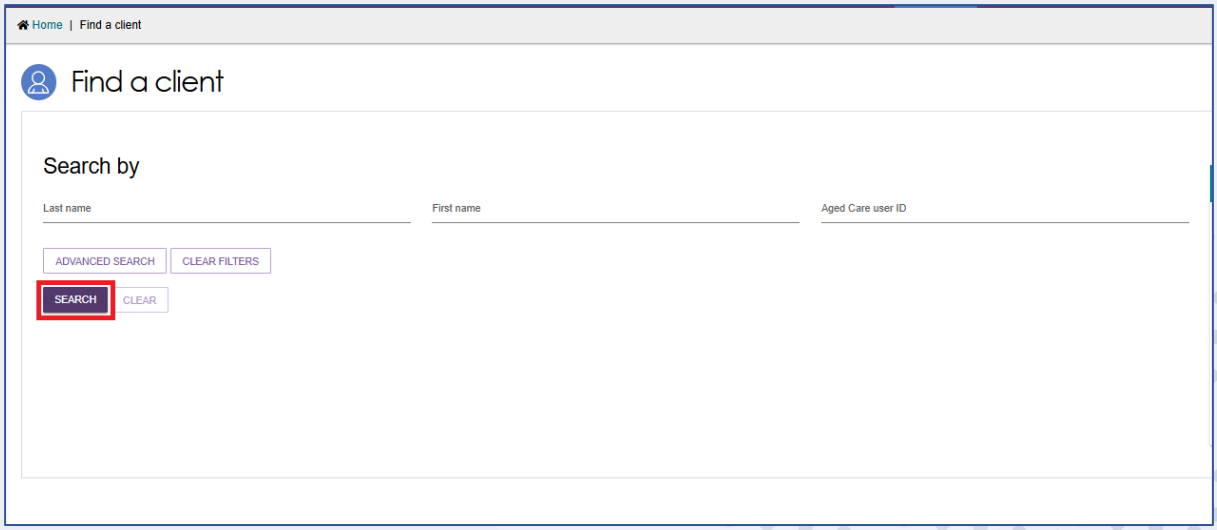
1. Select **Find a client** from the home page.



2. Next, search for the client. There are two ways to search: Normal or Advanced.

Normal Search

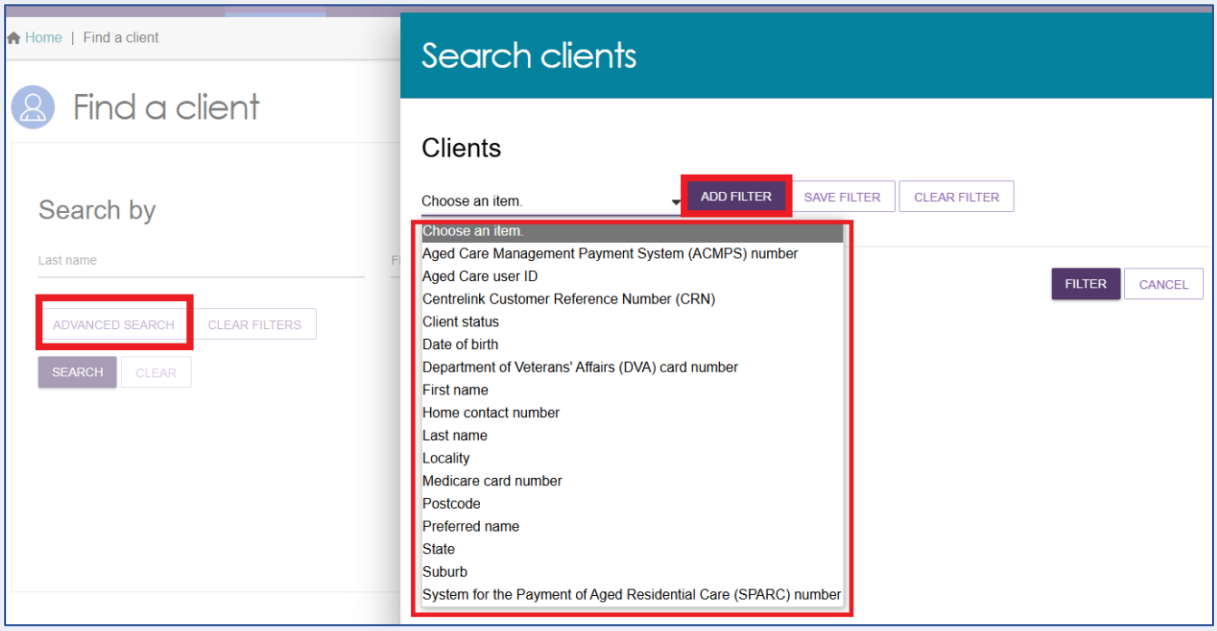
Enter the client's first name, last name and/or Aged Care User ID and select **SEARCH**.



Advanced Search

Alternatively, you can select **ADVANCED SEARCH** to conduct a custom or refined search.

The Advanced Search functionality allows you to search by additional fields, such as date of birth, Medicare number, suburb, etc. This filter can be applied across various sections within the portal. Choose the required filter item from the dropdown menu and select **ADD FILTER**.

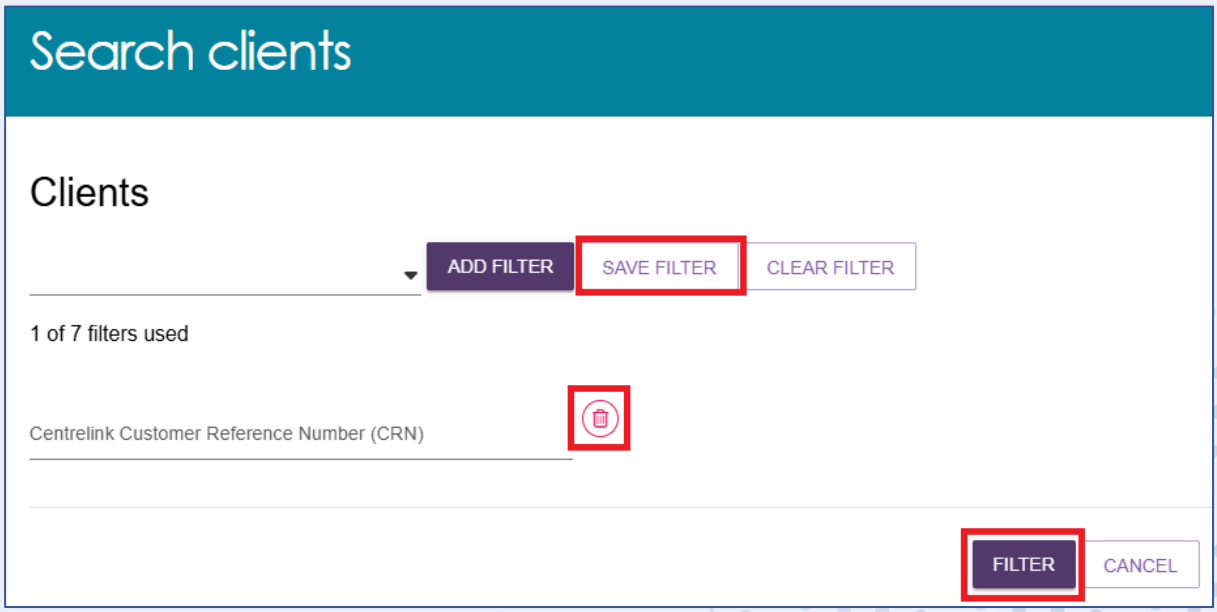


You can save a filter for future use by choosing the item and selecting **SAVE FILTER**.

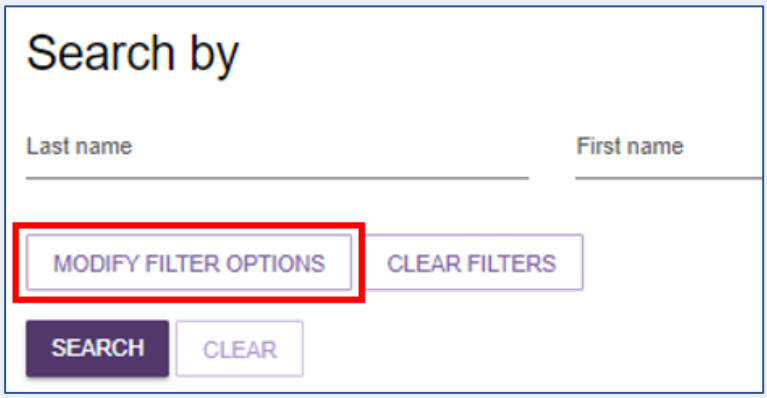
This will display the custom filter (shown below) so it can be easily accessed in the future.

To remove a filter, select the red **Recycle Bin** button next to the filter you wish to remove. You can choose to add that filter back again.

To apply your chosen settings, select the **FILTER** button.



When filters have been applied, the **Advanced Search** link changes to **MODIFY FILTER OPTIONS**.



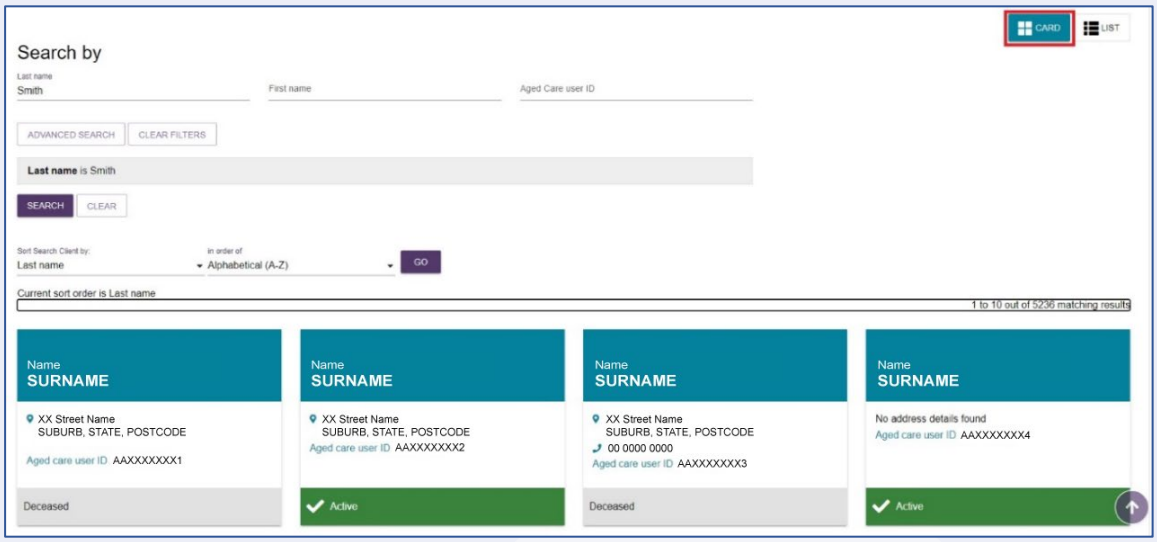
Selecting **CLEAR FILTERS** will clear the information entered.

Selecting **CLEAR** will clear any current search results.

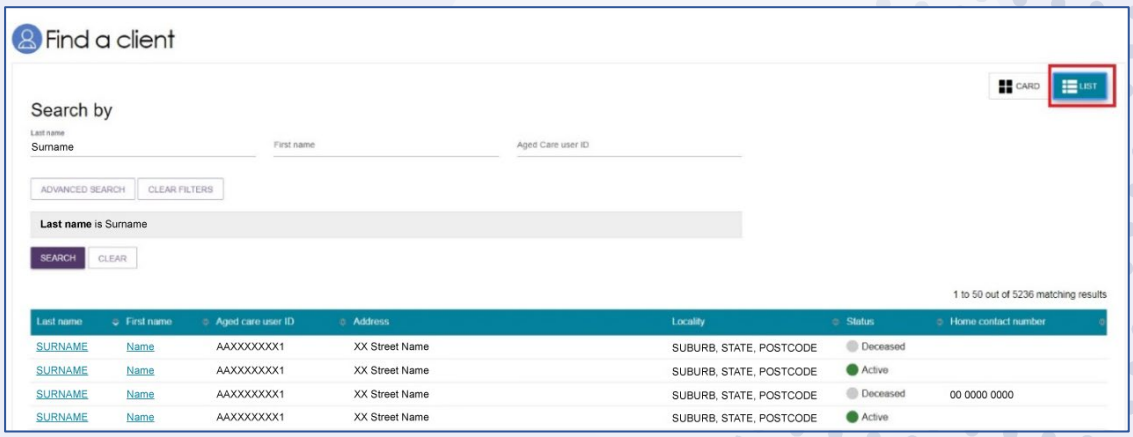
Any matching search results will be displayed.

The results will be shown either in Card view or List view, depending on your selection.

Example of card view



Example of list view



Where there are multiple search results, please ensure you review the records first to determine the appropriate client.

Client summary

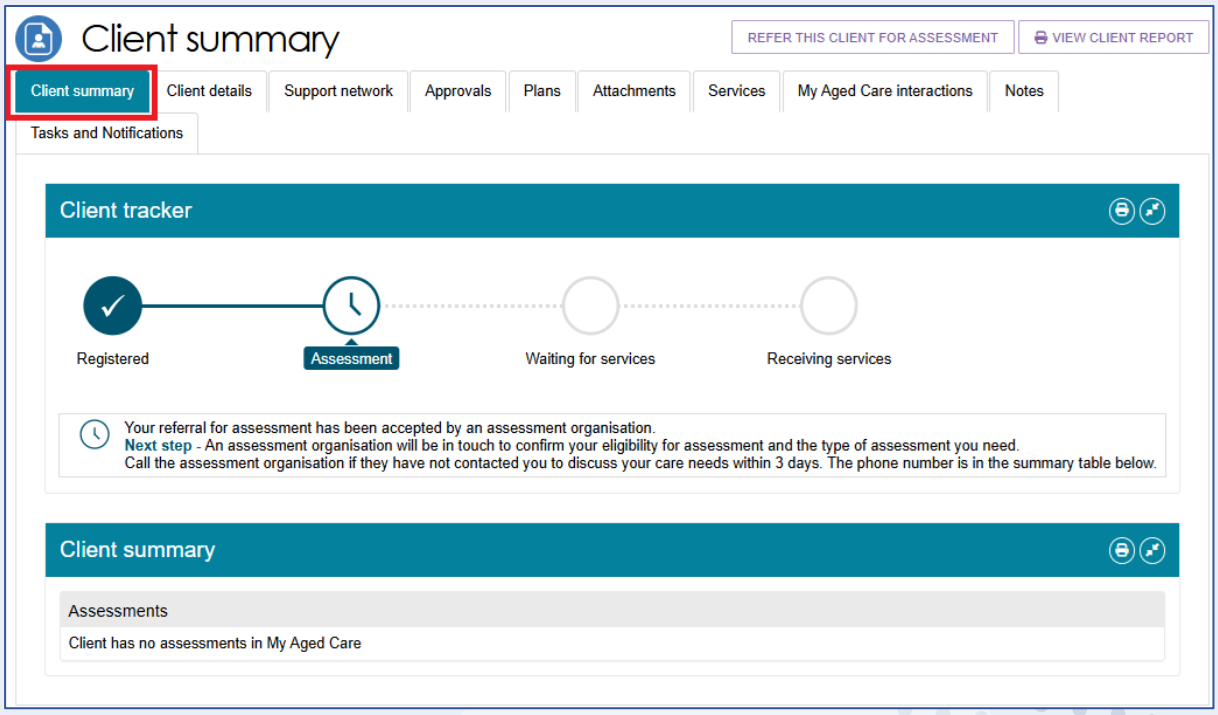
Select the client to open the Client summary tab.

This page gives you a quick overview of the client's aged care journey. It contains the Client Journey Tracker and the Client Summary sections.

The Client Journey Tracker (client tracker) is a visual tool that shows where a client is in their My Aged Care journey and what happens next. It also helps assessors know the right time to refer clients for an assessment. The example below shows what the Client Journey Tracker looks like after an assessment organisation has accepted an assessment referral. The client's next step is: 'an assessment organisation will be in touch to confirm your eligibility for assessment and the type of assessment you need.'

The Client summary section shows key information about the client, including assessment details, recommendations and approvals, service delivery status, concerns, goals, and their current status.

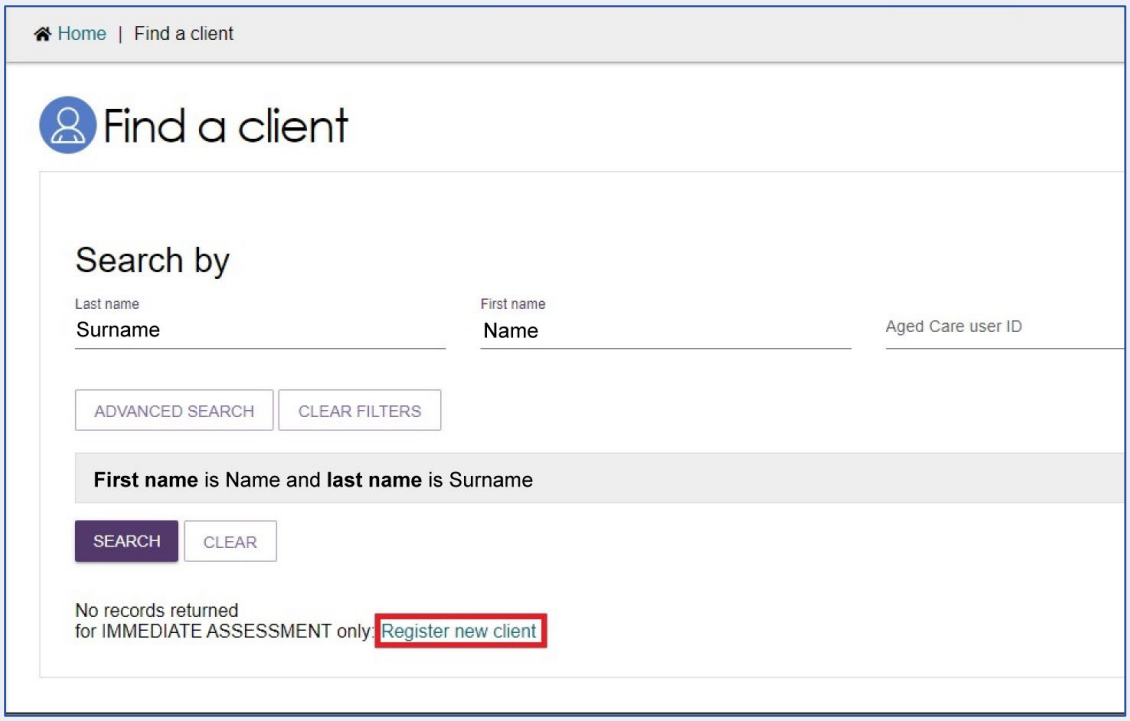
This page only displays information that applies to the client. The image below shows an example of the screen for a new client or a client having their first aged care assessment.



Registering a client in the Portal

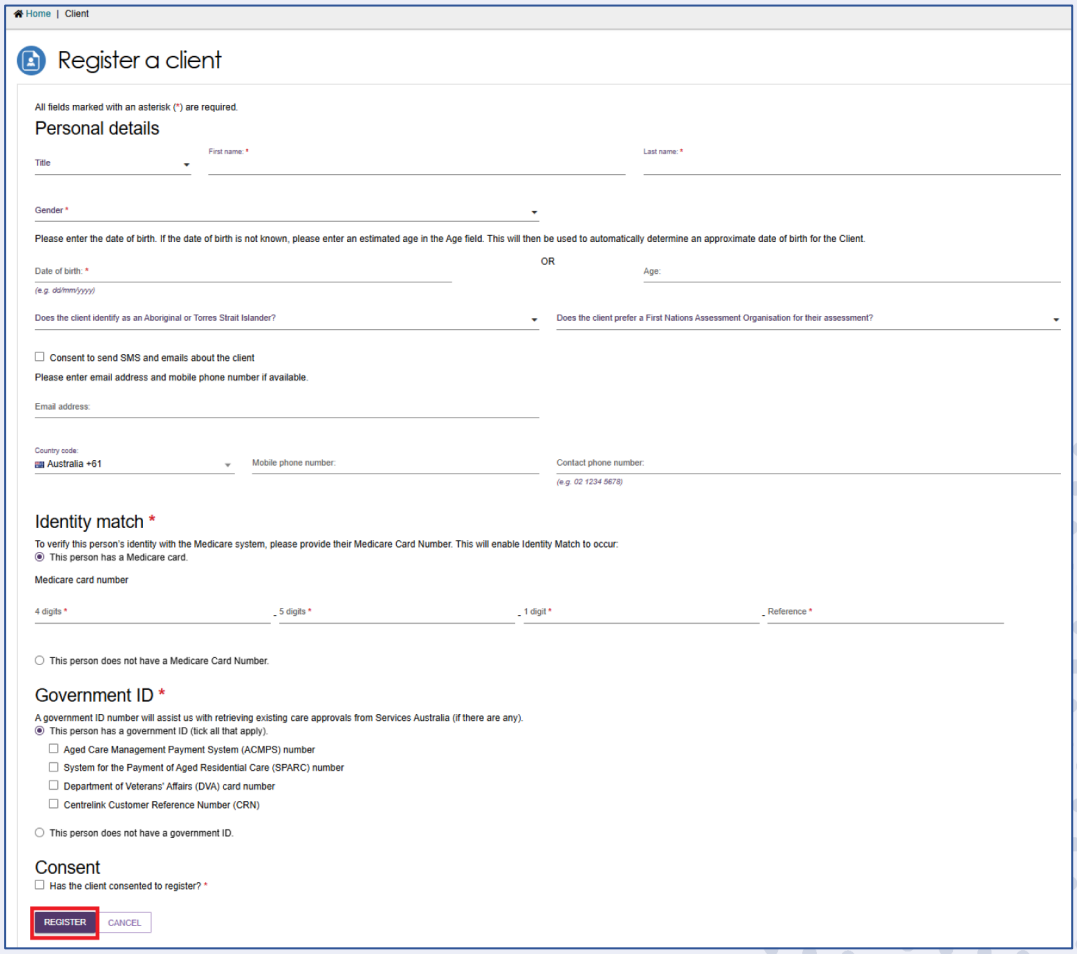
1. If you tried to find a client and there are **no records returned**, select **Register new client** for immediate assessment only.

! You must have the client's consent to successfully complete registration.



3. The **Register a client** page appears. Enter all mandatory fields marked by red asterisks (*) such as: name, gender, date of birth, Identity documents, Government IDs, and the client's consent.

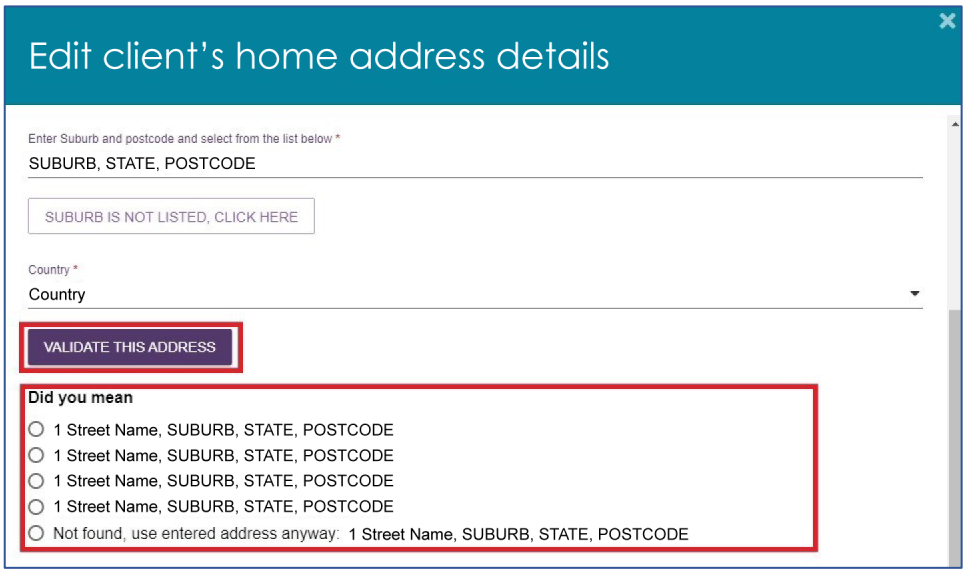
   Select **REGISTER**.



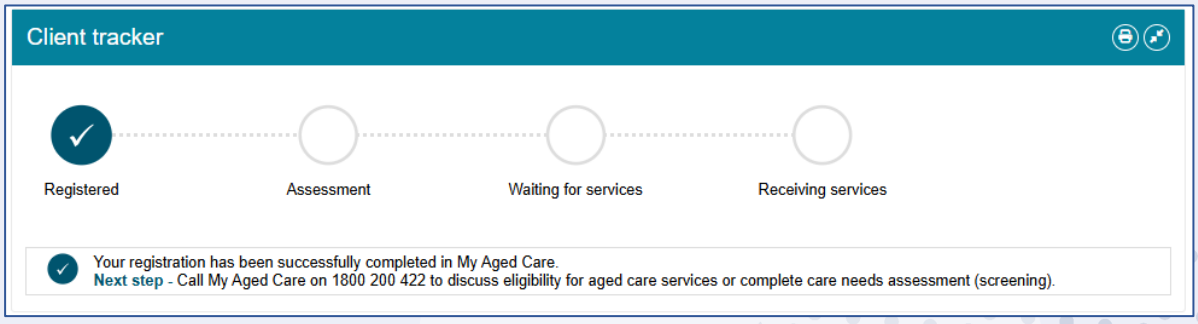
! Clients can choose to identify as Aboriginal or Torres Strait Islander and can request assessment by a First Nations Assessment Organisation.



! Always validate the address when you add a new address or update an existing one. This helps make sure the client receives correspondence at the correct address and is assigned the correct MMM classification for assessment.



4. The Client Journey Tracker shows that you have successfully registered the client.



Email and SMS notifications

! You can record a client's email address and mobile phone number when you register them. Before you do this, get the client's consent to receive email or SMS notifications.

Clients and their supporters can provide an email address, a mobile phone number, or both to receive updates at key stages of the client's My Aged Care journey.

To set up email or SMS notifications during registration, select the **Consent to send SMS and emails about the client** checkbox and enter the client's email address, mobile phone number, or both.

You can view or change notification preferences on the *Client details* tab in the assessor portal.



For information about setting up email notifications for existing clients and supporters, refer to My Aged Care – Assessor Portal User Guide 2 – Registering support people and adding relationships.

Registering or assessing a client in the App

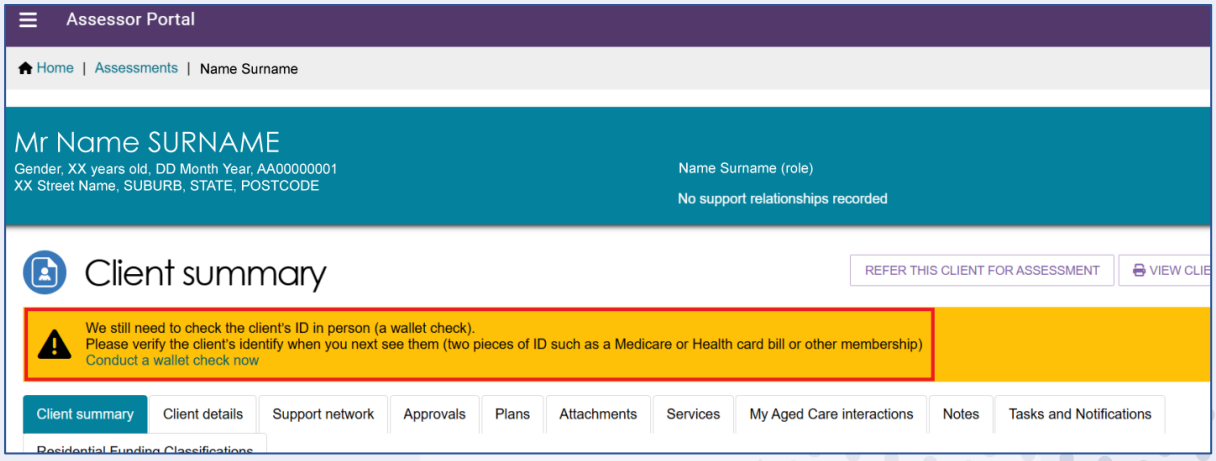
If you use the Assessor App to assess a client who has not been referred to your organisation, use the **Add offline client** function.

For instructions, refer to the Aged Care Assessor Application User Guide.

When you reconnect to the internet, check whether the client already has a record. If they do not, register the client and arrange a referral through the Contact Centre, then link the offline client record to the registered client record.

Verifying a client's identity

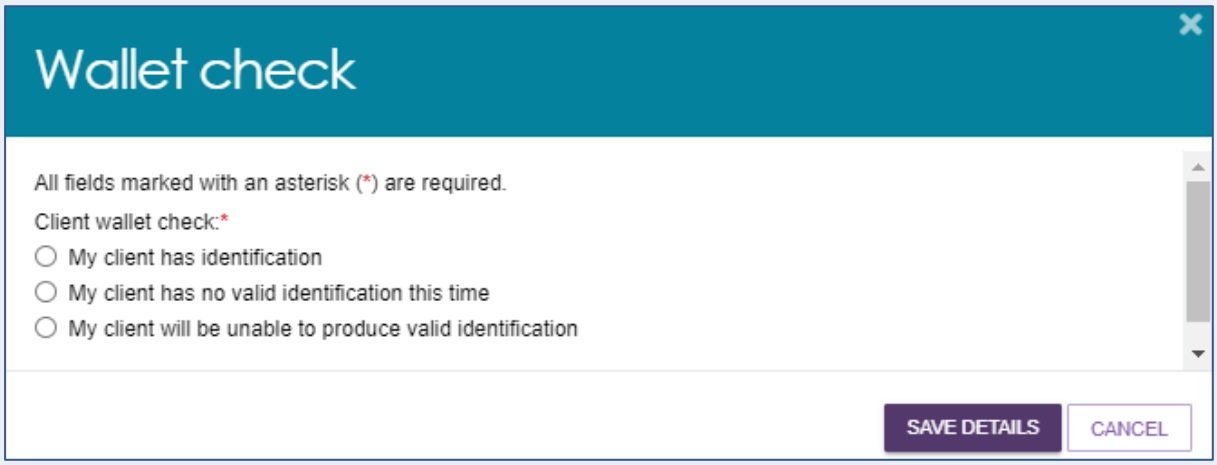
1. To verify the client's identity, open their client record and select **Conduct a wallet check now**. You can also complete the wallet check in the App or at other stages of the assessment.



2. Select the appropriate scenario and then select **SAVE DETAILS**.

   If you select:

   - **My client has identification**: you will then need to enter two types of ID and the date that you have performed the check.
   - **My client has no valid identification this time**: the system will remind you to ask the client for ID in the future.
   - **My client will be unable to produce valid identification**: the system will not ask you to ID-check this client again.

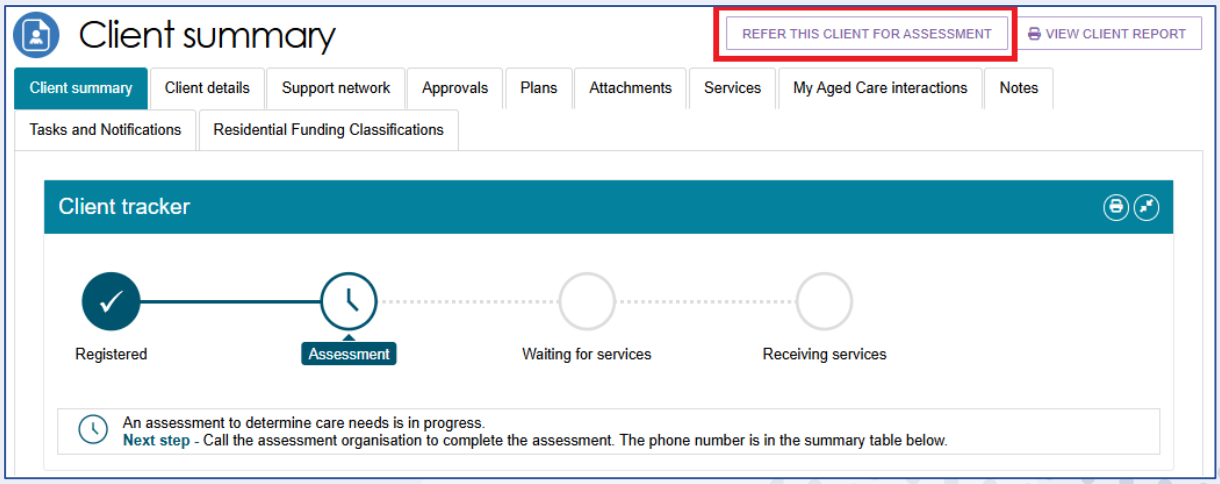


Self-referring a client and starting triage

! Only clinical staff members who have the Triage Delegate role in the My Aged Care assessor portal can complete the triage. For further information on the Triage Delegate role, visit My Aged Care Assessor Portal User Guide 12 – Managing delegate roles.

! If your outlet supports an assessment type, you can refer clients for that assessment. For example, non-clinical aged care needs assessors can refer clients for both Home Support and Comprehensive assessments if their outlet supports both.

1. To refer a client for assessment, open the client's record and select **Refer This Client for Assessment**.

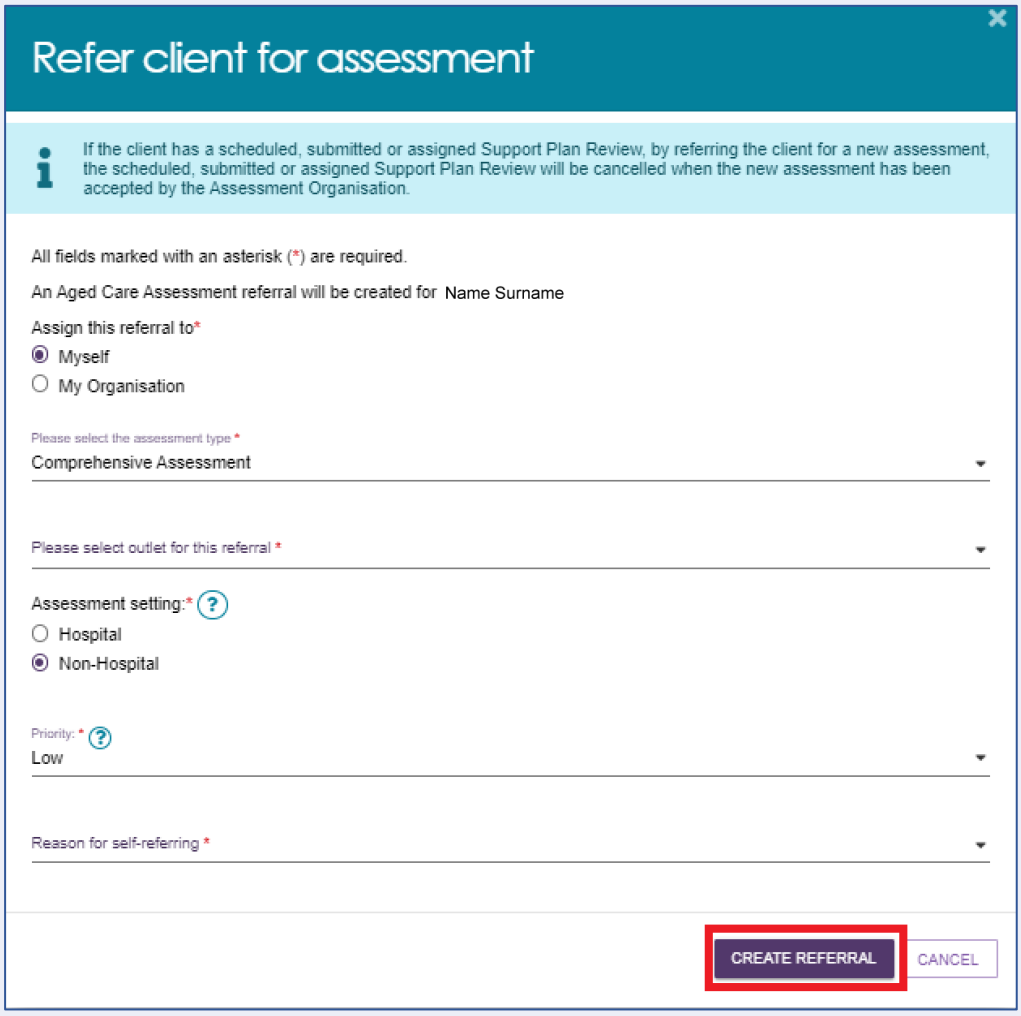


2. In the pop-up window:

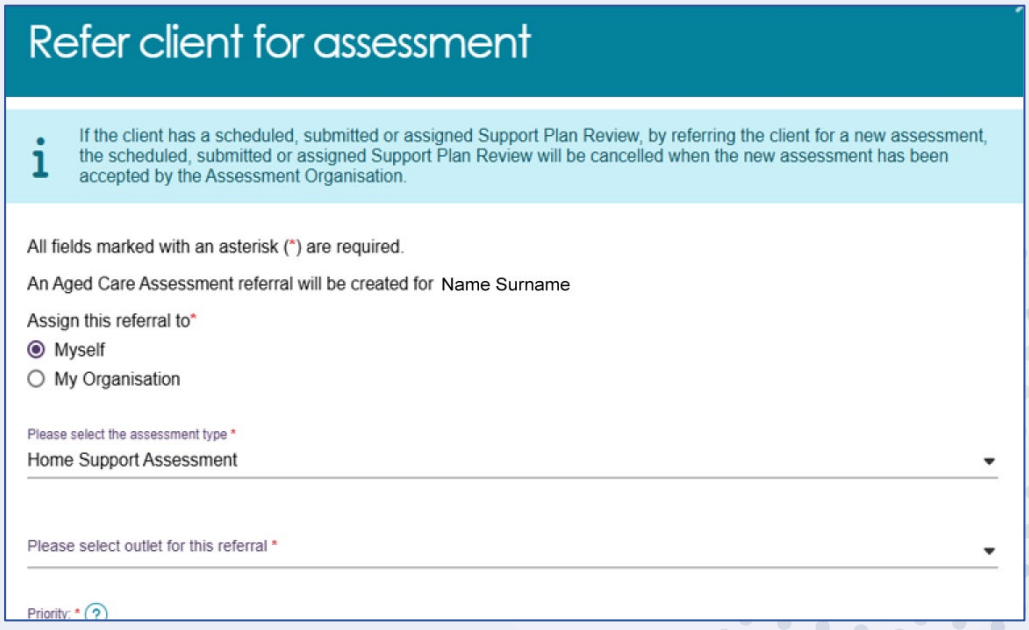
   - Assign the client to **Myself** or **My Organisation**. For guidance on when to assign to yourself or your organisation, refer to the My Aged Care Assessment Manual.
   - Select the assessment type: Comprehensive or Home Support.
   - Select the outlet for the referral.
   - Select the assessment setting (Comprehensive assessments only).
   - Choose the assessment priority: High, Medium, or Low.
   - Select the reason for the self-referral: Remote Assessment, First Nations, In Hospital, Homeless, At Risk of Homelessness, or Vulnerable.

   Then, select **CREATE REFERRAL**.

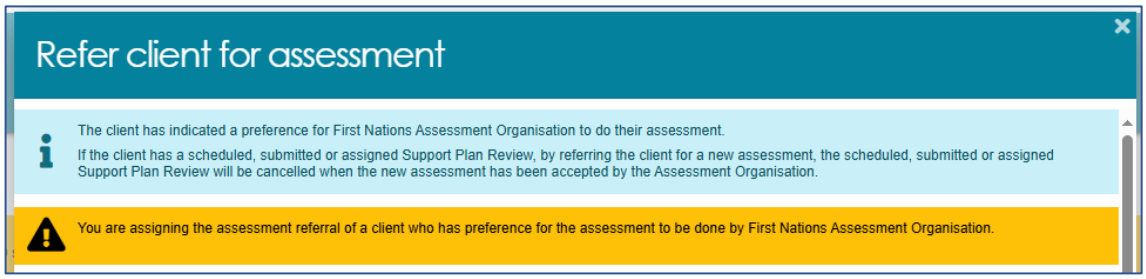
Comprehensive Assessment



Home Support Assessment



! If the client wants an Aboriginal and Torres Strait Islander Assessment Organisation to complete their assessment, you will see this in both the information (blue) banner and the warning (amber) banner.

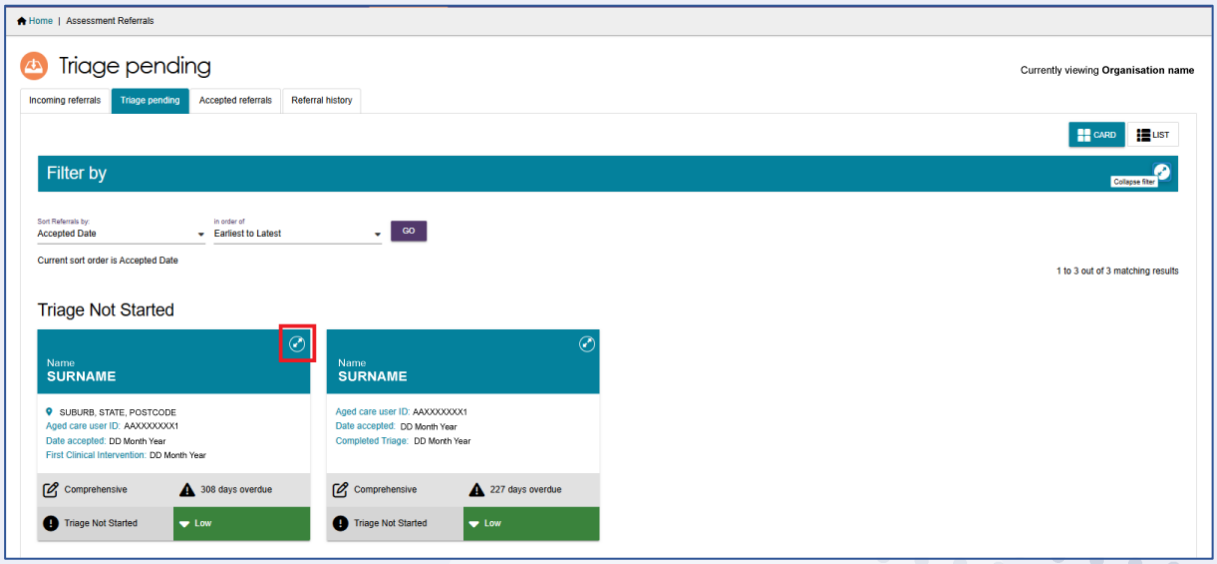


! **Cohabitants**

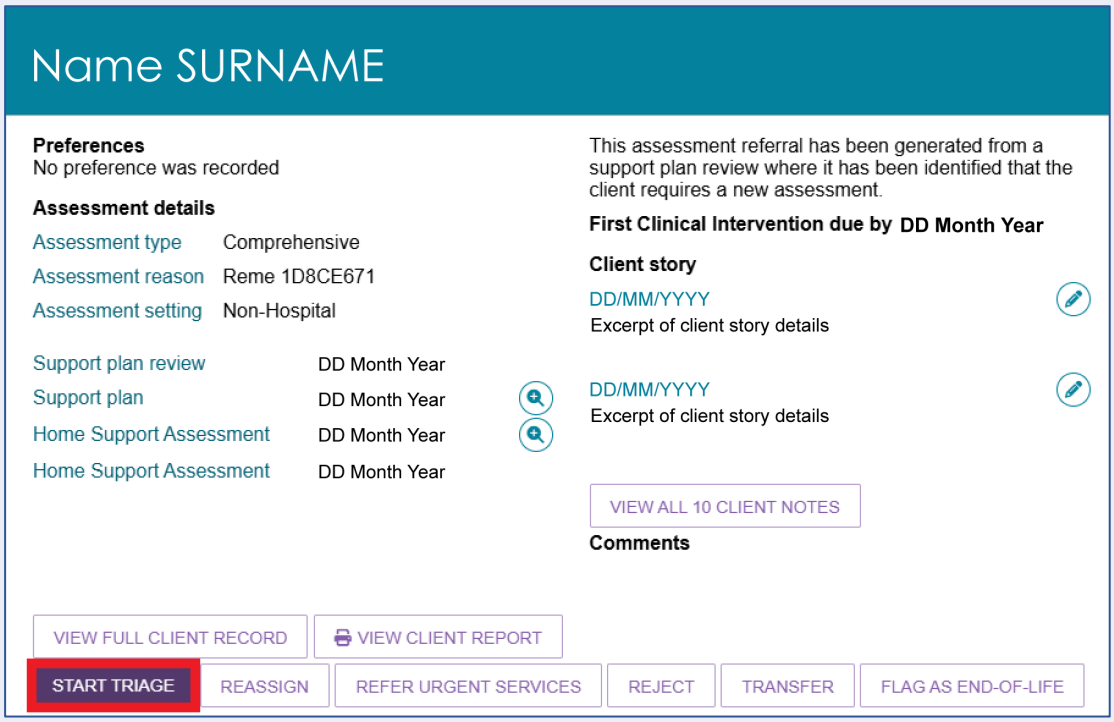
If you identify someone living with the client who may need aged care services, encourage them to contact My Aged Care for screening. The screening process will determine whether they are eligible for an assessment referral. For more information, please refer to Facilitating a referral for a potential client.

3. If you assign the referral to yourself, the system will take you to the **Current Assessments** page. Before you can complete the assessment, you must complete triage.

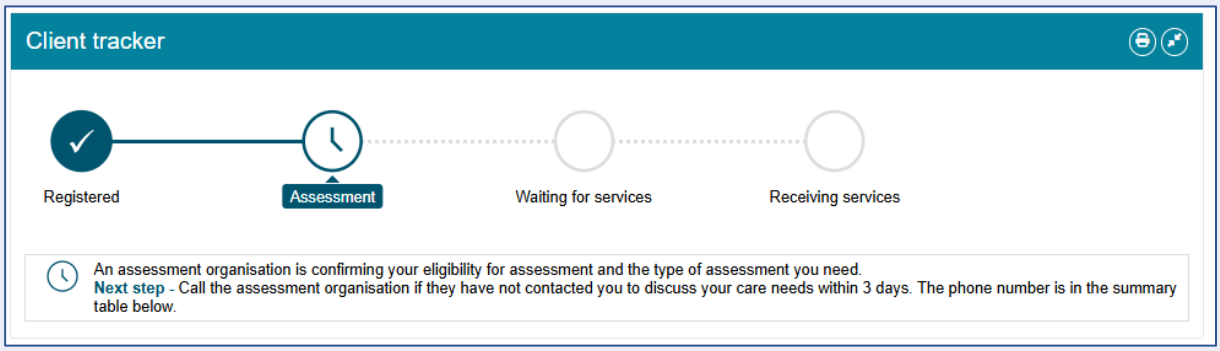
   To start triage, select the **Expand** button in the top-right corner of the client card.



4. Select **Start Triage** and complete the required consent and demographic details. For instructions on how to complete a triage, refer to the My Aged Care – Assessor Portal User Guide 3 – Managing referrals for assessment and support plan reviews.



The Client Journey Tracker shows that the triage is in progress.



5. If you assign the referral to yourself and you are a **Triage Delegate**, you can complete triage and then continue to the assessment using the IAT. You can also mark an incoming referral as **Ineligible for Assessment** without completing triage. For more information, refer to My Aged Care – Assessor Portal User Guide 3 – Managing referrals for assessment and support plan reviews.

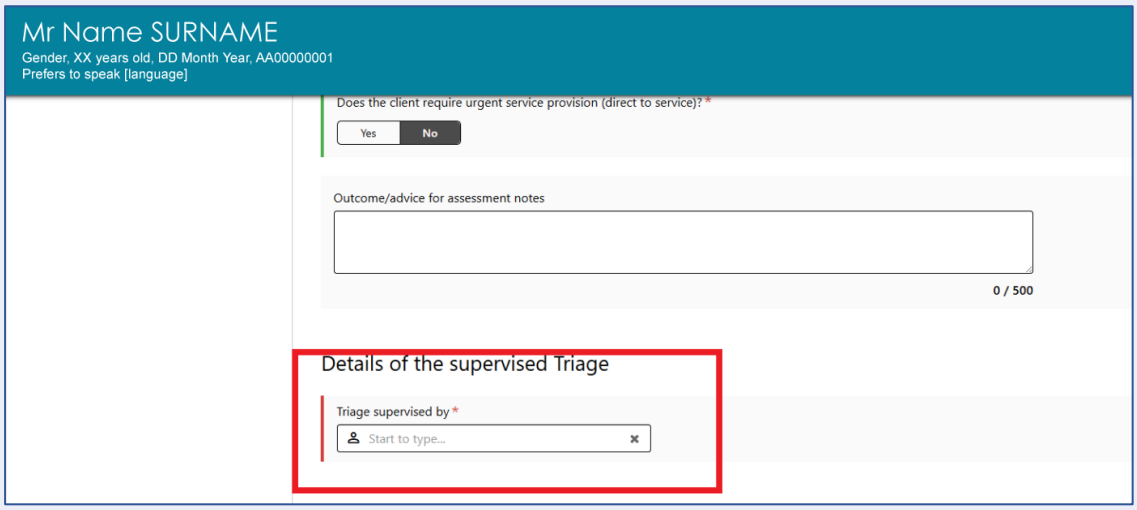
   If you assign the referral to yourself but you are not a Triage Delegate, you must complete triage under the supervision of a Triage Delegate. Record the supervision details in the portal during triage.

   To record supervision details:

   a) Go to the **Details of the Supervised Triage** section at the bottom of the triage questions.
   b) Select the appropriate supervisor.
   c) Select **Save Triage**.

   After you save the triage, you can continue with the assessment using the IAT.

   For more information on completing a supervised triage, refer to the My Aged Care Assessment Manual.



Facilitating a referral for a potential client

Before you can complete an assessment, the client's referral must be assigned to you in the Assessor Portal.

If you identify someone living with the client who may need aged care services and they have not been referred to you, follow these steps:

1. Encourage the person to contact the My Aged Care Contact Centre on 1800 200 422 to request screening. The screening process will determine whether they are eligible for an assessment referral.
2. Once they are found eligible, a Team Leader must accept the referral in the Assessor Portal.
3. A Triage Delegate must then complete triage.
4. After triage is complete, the Triage Delegate or Team Leader can assign the referral to an assessor.
5. If the referral is assigned to you, it will appear in your Current Assessments list under the Assessments tile. You can then start the assessment.

