

Assessor Portal User Guide 10 - Assessment Delegate Processes

This guide helps Assessment Delegates use the My Aged Care Assessor Portal to complete functions required under the Aged Care Act 2024 in their role as a System Governor.

You can use the portal to:

- View and action delegate decisions.
- Request corrections to care approval decisions.
- Request and approve care extensions.

Clinical Assessment Delegates can approve older people for all service groups, classification types and classification levels available under the Aged Care Act 2024.

Non-clinical Assessment Delegates can only approve:

- Entry-level home support services
- Assistive Technology (AT) services
- Home Modification (HM) services

These approvals are limited to the following classification levels:

- CHSP Class
- AT CHSP
- AT-HM Classifications.

! To understand the responsibilities of Clinical and Non-clinical Assessment Delegates under the Aged Care Act 2024, refer to Chapter 7, *Delegations and Approvals under the Act*, in the [My Aged Care Assessment Manual](#).

From 29 June 2026, My Aged Care will replace the offline process for Non-clinical Delegate decisions with a fully integrated workflow in the assessor portal.

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The Assessment Delegate home screen

Clinical and Non-clinical Assessment Delegates can access the same tiles on the Assessor Portal home page. The key difference is the types of assessments and approvals each role can

manage.

Clinical Assessment Delegates can:

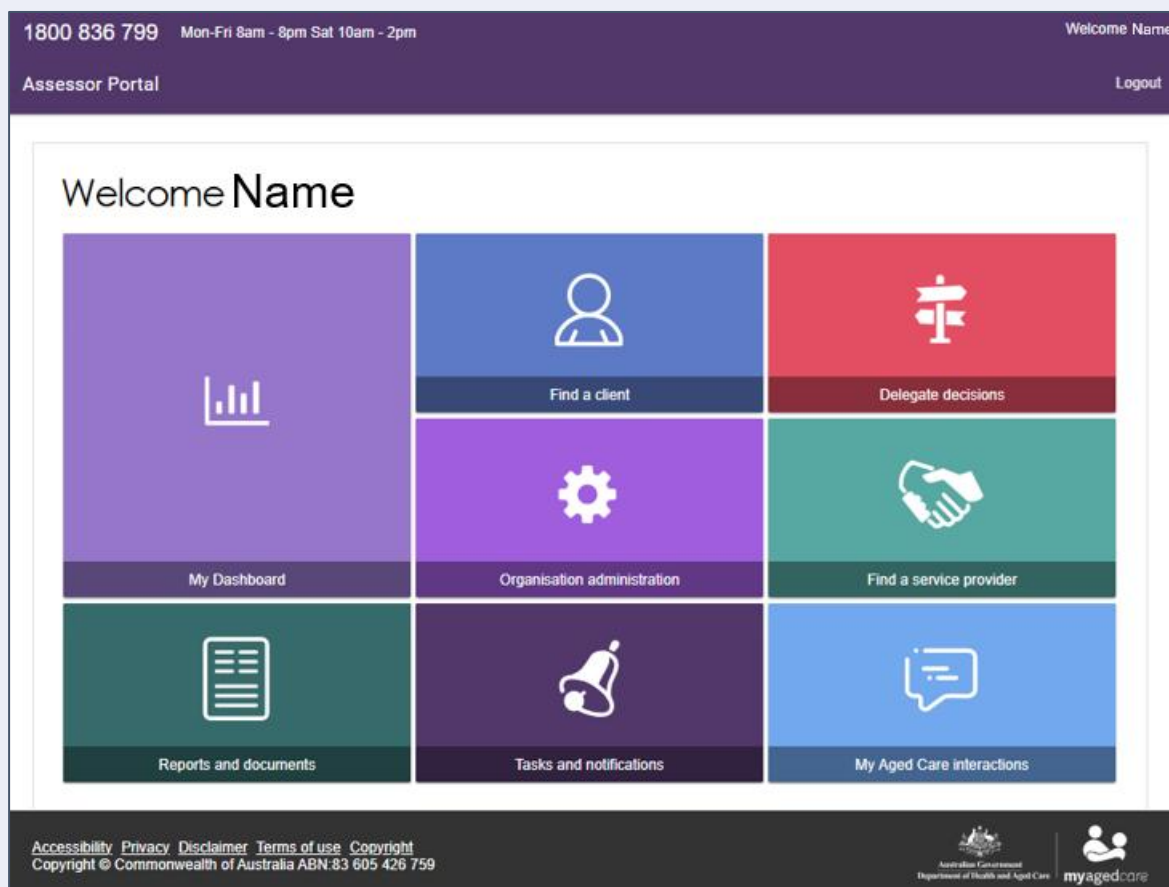
- Approve older people for all service groups, classification types and classification levels under the Aged Care Act 2024.
- Assign and approve decisions for Comprehensive and Home Support assessments.
- Initiate correction requests for Comprehensive and Home Support assessments.

Non-clinical Assessment Delegates can:

- Approve entry-level home support, Assistive Technology (AT), and Home Modification (HM) services only.
- Approve assessments with the following classification levels: CHSP Class, AT CHSP, HM CHSP.
- Approve decisions and initiate correction requests for Home Support assessments only.

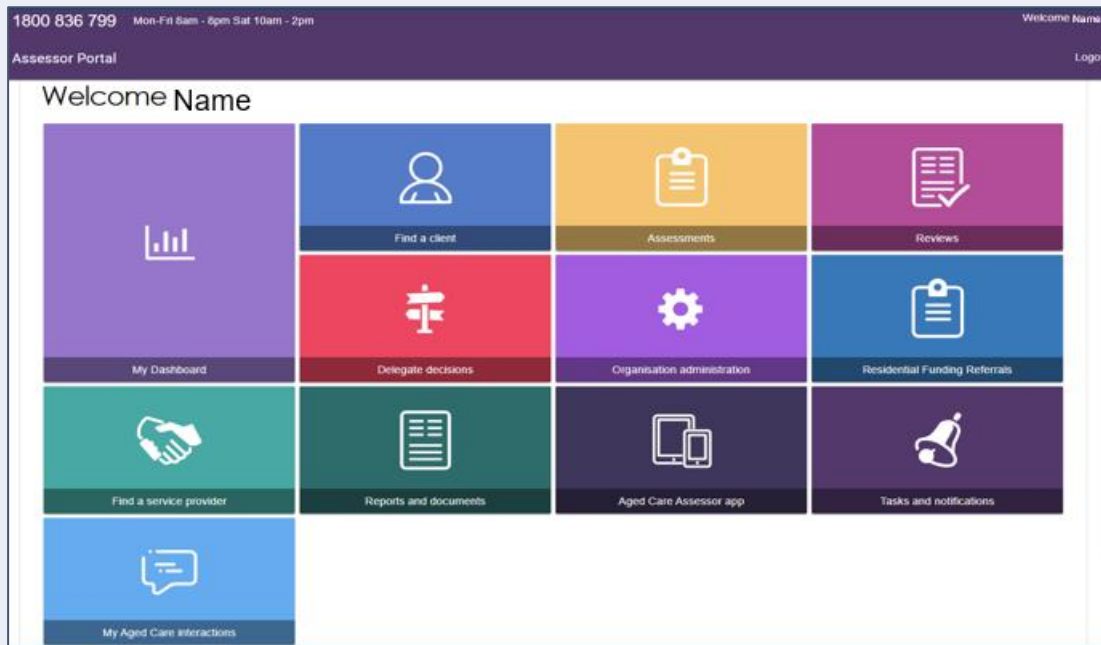
Both Clinical and Non-clinical Assessment Delegates can:

- Record recommendations for **No Care Approval**.
- Record recommendations for **No Change to Existing Care Approvals**.



The Assessment Delegate + Assessor dual role home screen

If you are both an Aged Care Needs Assessor and an Assessment Delegate, the Assessor Portal home page will display the following view.



For information on how to apply for an Assessment Delegate role, refer to the [My Aged Care – Assessor Portal User Guide 12 – Managing delegate roles](#).

Client Journey Tracker

The Client Journey Tracker is a visual tool that shows where a client is in their My Aged Care journey and what happens next. It displays above the Client Summary. As an example, when a client has been assessed and recommended for one or more services that requires delegate approval, their tracker will show that 'services have been recommended for approval':

You can confirm the client's status by going to their client summary page. Do this by going to their client card or listing, and then select VIEW FULL CLIENT RECORD.

Client summary

[REFER THIS CLIENT FOR ASSESSMENT](#)
[VIEW CLIENT REPORT](#)

[Client summary](#)
[Client details](#)
[Support network](#)
[Approvals](#)
[Plans](#)
[Attachments](#)
[Services](#)
[My Aged Care interactions](#)
[Notes](#)

[Tasks and Notifications](#)
[Residential Funding Classifications](#)

Client tracker

Registered

Assessment

Waiting for services

Receiving services

Services have been recommended for approval.
Next step - An assessor will be in touch with a decision on recommended services. Call the assessment organisation to discuss the assessment outcome and next steps or use the Find a Provider tool on the My Aged Care website at www.myagedcare.gov.au/find-a-provider. The assessment organisation phone number is in the summary table below.

Assessment history

Assessment Delegates can use the **Plans** tab in the client record to review a client's assessment history and support delegate approval decisions.

In the Assessment History section, you can view key information, including:

- Whether a non-clinical needs assessor converted a Home Support Assessment to a Comprehensive Assessment.
- Details of the clinical supervising assessor associated with the assessment.

First Name Last Name
 Male, 100 years old, DOB (DD Month Year), ACXXXXXXX
 Prefers to speak Assyrian, identifies as Aboriginal and Torres Strait Islander

Primary contact: First Name Last Name
 No support relationships recorded

[REFER THIS CLIENT FOR ASSESSMENT](#)

[Client summary](#)
[Client details](#)
[Support network](#)
[Approvals](#)
[Plans](#)
[Attachments](#)
[Services](#)
[My Aged Care interactions](#)
[Notes](#)
[Tasks and Notifications](#)
[Residential Funding Classifications](#)

Current Episode
 Episode ID: 2-21094NT9
 DD Month Year - Present
[SUPPORT PLAN](#)

Recommendations

- Allied health and therapy
- Support at Home
 - Home Support Ongoing - Sali Classification 7
 - Assistive Technology Short-term - AT Medium

[SEE SERVICE DETAILS](#)

Upcoming Review(s)
 No upcoming reviews scheduled

Assessment history

Comprehensive Assessment DD Month Year
[COMPREHENSIVE ASSESSMENT 30 APRIL 2025](#)
[PRINT](#)

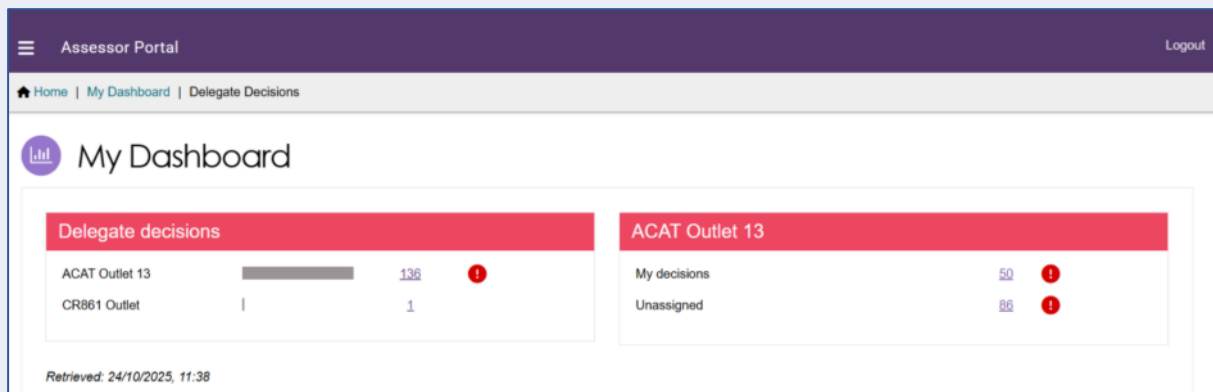
Date referral issued	DD Month Year
Referral issued by	Example AGED CARE Outlet ACAT-RAS
Assessment reason	Portal Referral
Status of referral	Accepted
Triage date	DD Month Year
Triage organisation	GRAZIER AGED CARE - ACA - ACT
Triage conducted by	First name Last name
Triage outcome	Comprehensive (clinical) assessment required
Assessment type	Comprehensive Assessment
Assessment type changed by	First name Last name
Date Assessment type changed	DD Month Year
Reason for change	High level care needs
Change comments	123456
Assessment organisation	Example AGED CARE - ACA - ACT
Assessment organisation contact number	02 0202 0202
Date referral accepted	DD Month Year
Date assessment commenced	DD Month Year
Date assessment completed	DD Month Year
Assessor	First name Last name

Viewing an item for decision

Clinical and Non-clinical Assessment Delegates can access the Delegate Decisions tile from the Assessor Portal home page. From there, they can view decisions in the **Decision Pending** and **Decision History** tabs.

Delegates can also use the **My Dashboard** tile to view a summary of delegate decisions in their outlet, including:

- The total number of delegate decisions.
- The number of decisions assigned to them.
- The number of unassigned decisions.



Follow these steps to view assessments that require a delegate decision.

1. Select **Delegate Decisions** from the home page.
2. Open the **Decision Pending** tab to view assessments awaiting a delegate decision.

You can use the **First Name**, **Last Name**, and **Aged Care User ID** filters to find specific assessments. To access more filter options, select **Advanced Search**.

You can also sort the results by:

- Assessment status
- Last name
- First name
- Aged Care ID
- Date submitted
- Priority (urgency)
- Assessor name
- Delegate name
- Due date.

You can choose the order in which the results are displayed.



Decision pending

Decision pending
Decision history

CARD

LIST

Filter by

Last name:

First name:

Aged Care User ID:

ADVANCED SEARCH

CLEAR FILTERS

Assigned To is Mine And Unassigned

FILTER

CLEAR

Sort Decisions Pending by:

in order of

Priority

High to Low

GO

Current sort order is Priority

1 to 1 out of 1 matching result

- In **Card View**, the status appears at the bottom of the client card.
- In **List View**, the status appears in the **Assessment Status** column.

The **Due Date** for each assessment awaiting a delegate decision is visible in both Card View and List View. You can also sort and filter pending decisions by due date. *Decisions Pending tab - Card View*



Decision pending

Currently viewing ABC Outlet

Decision pending
Decision history

CARD

LIST

Filter by

1 to 3 out of 3 matching results

Sort Decisions Pending by:

in order of

Last name

Alphabetical (A-Z)

GO

My decisions

First Name

LAST NAME

Assessor: First Name Last Name

Delegate: First Name Last Name

Aged care user ID: ACXXXXXXXXX1

Delegate Decision due by: DD Month Year

39 days overdue

Medium

Awaiting Delegate Decision (Assessment)

First Name

LAST NAME

Assessor: First Name Last Name

Delegate: First Name Last Name

Aged care user ID: ACXXXXXXXXX2

Finalised Support Plan Review due by: DD Month Year

27 days overdue

Low

Awaiting Delegate Decision (Support Plan Review)

First Name

LAST NAME

Assessor: First Name Last Name

Delegate: First Name Last Name

Aged care user ID: ACXXXXXXXXX3

Low

Awaiting Delegate Decision (Undergoing Support)

Decisions Pending tab - List View

Decision pending Currently viewing ABC Outlet

Decision pending Decision history

CARD LIST

Filter by

Last name First name Aged Care user ID

ADVANCED SEARCH CLEAR FILTERS

Assigned to is Mine & unassigned

FILTER CLEAR

1 to 3 out of 3 matching results

Last name	First name	Aged care user ID	Assessor full name	Delegate full name	Assessment status	Date due	Priority
NAME	Name	ACXXXXXXXX1	LAST NAME First Name	LAST NAME First Name	Awaiting Delegate Decision (Assessment)	18/04/2026	Medium
NAME	Name	ACXXXXXXXX2	LAST NAME First Name	LAST NAME First Name	Awaiting Delegate Decision (Support Plan Review)	30/04/2026	Low
NAME	Name	ACXXXXXXXX3	LAST NAME First Name	LAST NAME First Name	Awaiting Delegate Decision (Undergoing Support)		Low

Select the **Decision History** tab to view delegate decisions you have previously completed.

Decision history Currently viewing ABC Outlet

Decision pending **Decision history**

CARD LIST

Filter by

Sort DecisionsPending by: Date Submitted in order of Latest to Earliest GO

Current sort order is Date Submitted

1 to 20 out of 1686 matching results

First Name
LAST NAME

Assessor: LAST NAME First Name
Delegate: LAST NAME First Name
Aged care user ID: ACXXXXXXXXX1
Date submitted: DD Month Year
Assessment type: Comprehensive

Finalised (Assessment) Low

First Name
LAST NAME

Assessor: LAST NAME First Name
Delegate: LAST NAME First Name
Aged care user ID: ACXXXXXXXXX2
Date submitted: DD Month Year
Assessment type: Comprehensive

Finalised Low

First Name
LAST NAME

Assessor: LAST NAME First Name
Delegate: LAST NAME First Name
Aged care user ID: ACXXXXXXXXX2
Date submitted: DD Month Year
Assessment type: Comprehensive

Delegate Decision Complete Low

3. In both the **Decision Pending** and **Decision History** tabs, you can switch between **Card**

For further information, go to My Aged Care | www.myagedcare.gov.au | 1800 836 799

View and **List View** to display client records in your preferred format.

							CARD LIST
Filter by							
							1 to 50 out of 1686 matching results
Last name	First name	Aged care user ID	Assessor full name	Delegate full name	Assessment status	Date submitted	Priority
NAME	Name	ACXXXXXXX1	LAST NAME First Name	LAST NAME First Name	Finalised (Assessment)	DD/MM/YYYY	Medium
NAME	Name	ACXXXXXXX2	LAST NAME First Name	LAST NAME First Name	Delegate Decision Complete (Assessment)	DD/MM/YYYY	Low

Assigning an item for decision

A Clinical Assessment Delegate can assign Comprehensive Assessments and Home Support Assessments to themselves. They can also assign Home Support Assessments to other Clinical Assessment Delegates or Non-clinical Assessment Delegates within their outlet.

A Non-clinical Assessment Delegate can assign Home Support Assessments to themselves or to other Non-clinical Assessment Delegates within the same outlet.

To assign a client:

1. In **Card View**, select the expand arrows on the client card to view a summary of the client's information in a pop-up window, then select **ASSIGN**.
In **List View**, select the expand arrows next to the client to view a summary of the client's information.

1. Card View

Home | Delegate decisions

Decision pending

Currently viewing Aussie Healthcare

You have report(s) that are ready to be downloaded. To download, go to Reports page.

Dick VAN DYKE

Aged 100 (13 December 1925), Male

Referred from Aussie Healthcare on 30 January 2026

Accepted on 30 January 2026

Delegate Decision due by: 1 February 2026

Assessor Andy Flower

Date submitted 30 January 2026

Assessment details

Assessment type Comprehensive Assessment

Assessment reason Self-Referral

Assessment setting Non-Hospital

Recommended care:

Home support Ongoing - SaH Classification 4

VIEW SUPPORT PLAN VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

ASSIGN

Filter by

Last name

ADVANCE

Assign

FILTER

Sort Decisions By

Last name

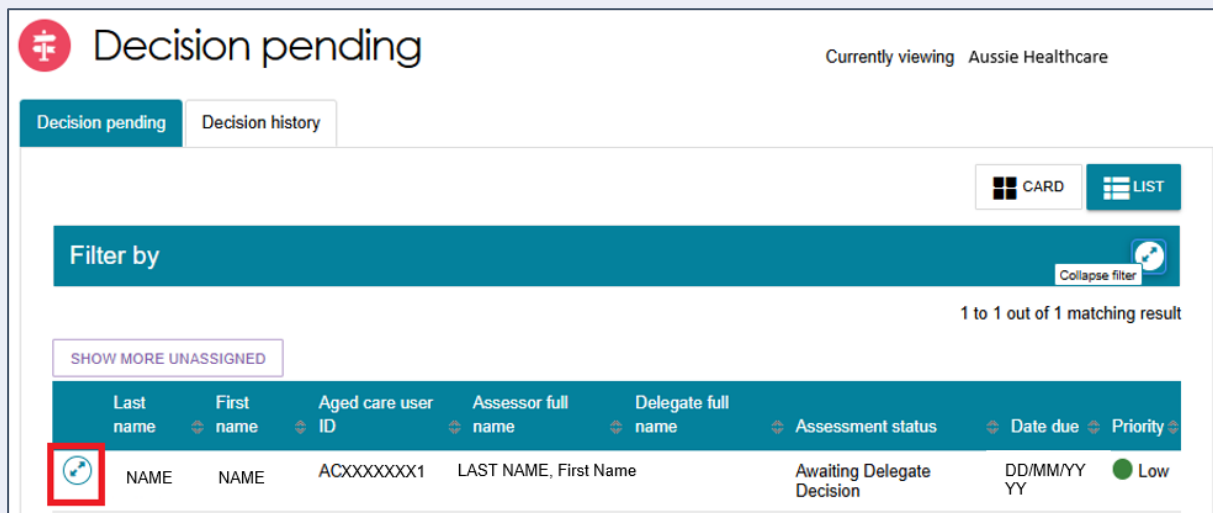
Alphabetical (A-Z)

GO

Unassigned

Dick VAN DYKE

List View



Decision pending

Currently viewing Aussie Healthcare

Decision pending Decision history

CARD LIST

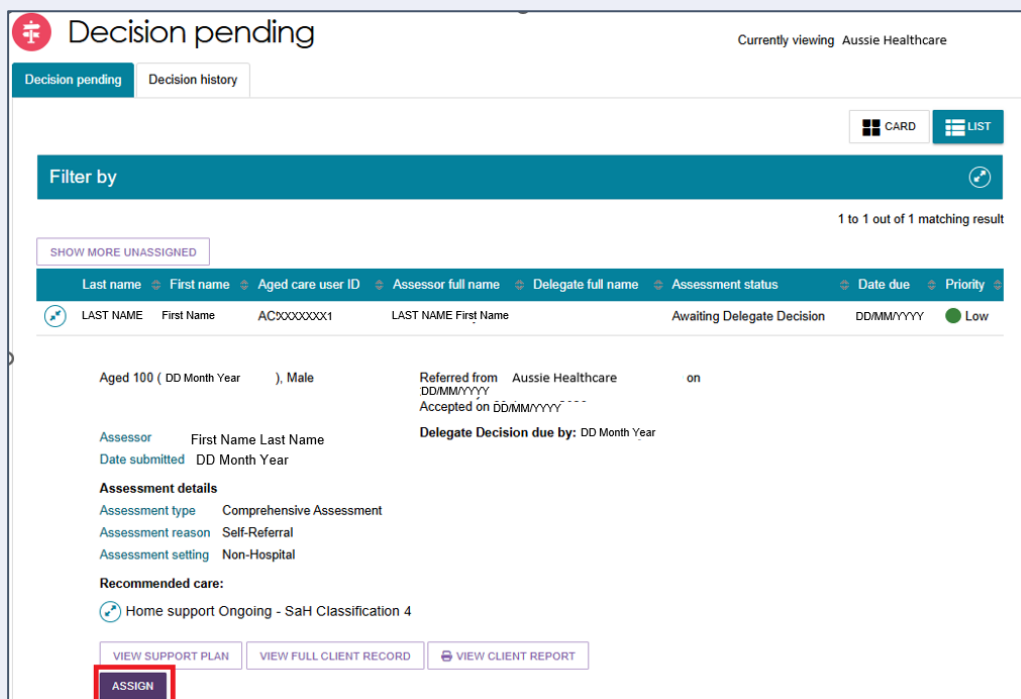
Filter by

1 to 1 out of 1 matching result

SHOW MORE UNASSIGNED

Last name	First name	Aged care user ID	Assessor full name	Delegate full name	Assessment status	Date due	Priority
NAME	NAME	ACXXXXXXX1	LAST NAME, First Name		Awaiting Delegate Decision	DD/MM/YY	Low

2. Select **ASSIGN** to assign the assessment to yourself or another Delegate.



Decision pending

Currently viewing Aussie Healthcare

Decision pending Decision history

CARD LIST

Filter by

1 to 1 out of 1 matching result

SHOW MORE UNASSIGNED

Last name	First name	Aged care user ID	Assessor full name	Delegate full name	Assessment status	Date due	Priority
LAST NAME	First Name	ACXXXXXXX1	LAST NAME First Name		Awaiting Delegate Decision	DDMMYYYY	Low

Aged 100 (DD Month Year), Male

Referred from Aussie Healthcare on DDMMYYYY

Accepted on DDMMYYYY

Assessor First Name Last Name

Date submitted DD Month Year

Delegate Decision due by: DD Month Year

Assessment details

Assessment type Comprehensive Assessment

Assessment reason Self-Referral

Assessment setting Non-Hospital

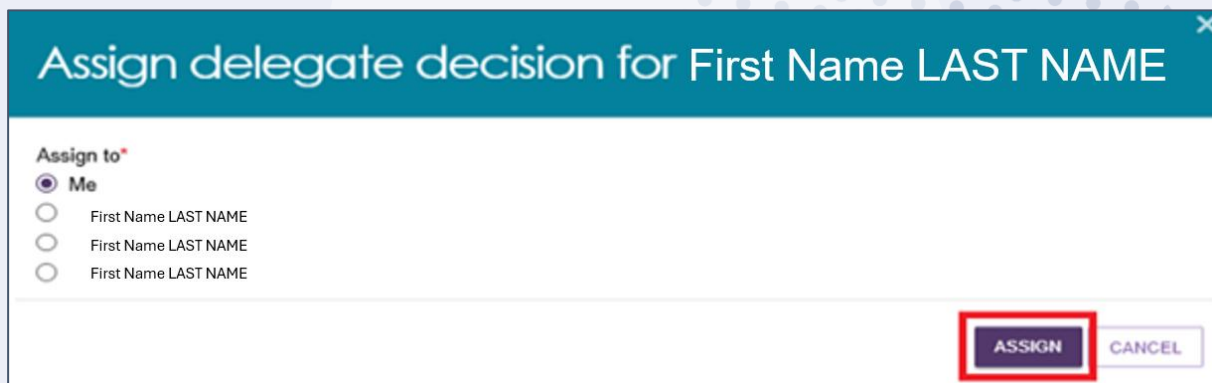
Recommended care:

Home support Ongoing - SaH Classification 4

VIEW SUPPORT PLAN VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

ASSIGN

3. In the pop-up window, select the Delegate who will receive the assessment, or select **Me** to assign it to yourself. Then select **ASSIGN**.



Assign delegate decision for First Name LAST NAME

Assign to*

☒ Me

☐ First Name LAST NAME

☐ First Name LAST NAME

☐ First Name LAST NAME

ASSIGN CANCEL

1. A confirmation message will appear. The assessment will then appear in the assigned Delegate's queue, or under **My Decisions** if you assigned it to yourself.

Decision pending Currently viewing Aussie Healthcare

Decision pending | Decision history

CARD | LIST

Filter by

1 to 1 out of 1 matching result

Sort Decisions Pending by: Last name | in order of Alphabetical (A-Z) | GO

My decisions

First Name
LAST NAME

Assessor: First Name Last Name
Delegate: First Name Last Name
Aged care user ID: ACXXXXXXXXX1
Delegate Decision due by: DD Month Year

Due in 2 days | Low

Reassigning for decision

Follow these steps to reassign an item for decision:

1. In **Card View**, select the expand arrow on the client card to view a summary of the client's information, then select **REASSIGN**.
In **List View**, select the expand arrow next to the client's name to view more information, then select **REASSIGN**.

1. Card View

My decisions

First Name
LAST NAME

Assessor: Andy Flower
Delegate: Prospect Free
Aged care user ID: AC94286739
Delegate Decision due by: DD Month Year

Due in 2 days

First Name LAST NAME

Aged 100 (13 December 1925), Male

Referred from Aussie Healthcare on 30 January 2026
Accepted on 30 January 2026

Delegate Decision due by: DD Month Year

Assessor First Name Last Name
Delegate First Name Last Name
Date submitted DD Month Year

Assessment details

Assessment type Comprehensive Assessment
Assessment reason Self-Referral
Assessment setting Non-Hospital

Recommended care:

Home support Ongoing - SaH Classification 4

VIEW SUPPORT PLAN | VIEW FULL CLIENT RECORD | VIEW CLIENT REPORT

START DECISION PROCESS | **REASSIGN**

List View

Last name	First name	Aged care user ID	Assessor full name	Delegate full name	Assessment status	Date due	Priority
LAST NAME	First Name	ACXXXXXXX1	LAST NAME First Name	LAST NAME First Name	Awaiting Delegate Decision	DD/MM/YYYY	Low

Aged 100 (DD Month Year), Male

Referred from Aussie Healthcare on DD Month Year
Accepted on DD Month Year

Delegate Decision due by: DD Month Year

Assessor First Name Last Name
Delegate First Name Last Name
Date submitted DD Month Year

Assessment details

Assessment type Comprehensive Assessment
Assessment reason Self-Referral
Assessment setting Non-Hospital

Recommended care:

Home support Ongoing - SaH Classification 4

VIEW SUPPORT PLAN VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

START DECISION PROCESS REASSIGN

- Select the Delegate you want to assign the item to, or if you want to remove the assignment, select **Place back in delegate queue**. Then select **REASSIGN**.

Re-assign delegate decision for First Name LAST NAME

Delegate decision currently assigned to Prospect FREE

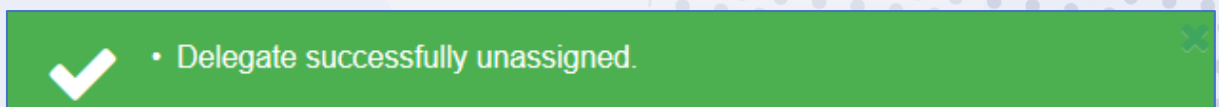
Re-assign to*

- ☐ First Name LAST NAME
- ☐ First Name LAST NAME
- ☐ First Name LAST NAME
- ☐ First Name LAST NAME
- ☐ First Name LAST NAME
- ☐ First Name LAST NAME
- ☐ First Name LAST NAME
- ☐ First Name LAST NAME
- ☐ Place back in delegate queue

RE-ASSIGN CANCEL

- A confirmation message will appear to confirm that you have reassigned the item or returned it to the delegate queue.

4.



Recording a delegate decision

Before you make a delegate decision, review the client's full record, assessment, support plan and any attached documents. This helps ensure you have enough evidence to support your decision.

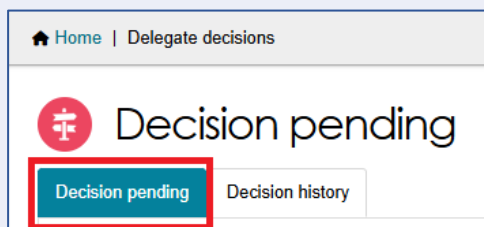
For example:

- You can view the assessor's assessment summary in the Identified Needs tab of the support plan.
- Information banners may appear in the Client Summary to indicate that the client is already approved for certain services.

Follow these steps to record your delegate decision:

Viewing decisions information

1. Go to the **Delegate Decisions** tile from the home page and select the **Decision Pending** tab.



2. Open the client record:
 - In **Card View** (shown below), select the expand arrow on the client card to view a summary of the client's information, then select **START DECISION PROCESS**.
 - In **List View**, select the expand arrow to view the client's information, then select **START DECISION PROCESS**.
- 3.

 A screenshot of a client record card. The card has a teal header with 'First Name LAST NAME'. Below the header, it shows client details: 'Aged 100 (DD Month Year), Male', 'Referred from Aussie Healthcare on DD Month Year', 'Accepted on DD Month Year', and 'Delegate Decision due by: DD Month Year'. There are fields for 'Assessor' and 'Delegate' (both 'First Name Last Name') and 'Date submitted' (DD Month Year). Under 'Assessment details', it lists 'Assessment type: Comprehensive Assessment', 'Assessment reason: Self-Referral', and 'Assessment setting: Non-Hospital'. Under 'Recommended care:', it shows 'Home support Ongoing - SaH Classification 4'. At the bottom, there are four buttons: 'VIEW SUPPORT PLAN', 'VIEW FULL CLIENT RECORD', 'VIEW CLIENT REPORT', and 'START DECISION PROCESS'. The 'START DECISION PROCESS' button is highlighted with a red rectangular box.

Clinical Assessment Delegates only: If you are also the assessor who completed the

client's assessment or support plan review, the system will display an error message.

Delegate decision information

Delegate approval should be provided by a different person to the person who conducted the assessment or support plan review. Please confirm that there is not another delegate available to provide it.

PROCEED
CANCEL

- The system will open the **Decisions** tab in the client's support plan. Review the recommendations submitted by the assessor here.

Support plan and services

PRINT COPY OF SUPPORT PLAN

Identified needs
Goals & recommendations
Decisions
Manage services & referrals
Associated People
Review

IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment

IAT Outcome: CHSP

Recommended classification: SaH Classification 4 AGREE

DISAGREE

Override reason: Higher level service needs

Override reason description: Description goes here

Recommended care requiring delegate decision

Recommend that the client receive Home support

ADD A CARE TYPE FOR DELEGATE DECISION
RECOMMEND AN ASSISTIVE TECHNOLOGY
RECOMMEND HOME MODIFICATIONS

RETURN TO ASSESSOR
RETURN TO CLIENT

- If you previously asked the assessor to [review the IAT questionnaire](#), you may also receive a message confirming that the review has been completed. Use the link provided in the message to view the IAT review.

Support plan and services

PRINT COPY OF SUPPORT PLAN

Identified needs
Goals & recommendations
Decisions
Manage services & referrals
Associated People
Review

IAT Outcome and Classifications

In line with legislation, you are not permitted to override the IAT Outcome to recommend a different ongoing home support classification level (e.g., CHSP or SaH class 1-8) nor can you override the IAT Outcome of 'ineligible for CHSP/SaH' to recommend ongoing home support services. If your intent is to recommend ongoing home support services through Support at Home or CHSP, please ensure the recommended classification aligns with the IAT outcome. You can override the IAT outcome to recommend other care types, such as short-term pathways and residential care, in line with guidance provided in the Aged Care Assessment Manual.

Note: If through the IAT review process, the IAT outcome results in a lower classification than the client's current existing classification, please ensure the Recommended Classification is equivalent to the client's existing Classification level when recommending ongoing home support services through Support at Home or CHSP.

Assessor has reviewed the IAT questionnaire as per delegate's request. View the Notes to delegate on the IAT review [here](#).

Current assessment type: Comprehensive Assessment

IAT Outcome: SaH Classification 4

Previous IAT Outcome: SaH Classification 4

Recommended classification: SaH Classification 4 AGREE

DISAGREE

Editing a recommended classification

1. Go to the **Delegate Decisions** tile and open the client record as described in [Viewing Decisions information](#).
2. Select the pencil (Edit) icon next to the current recommended classification.

IAT Outcome and Classifications

Current assessment type:

Comprehensive Assessment

IAT Outcome:

CHSP

Recommended classification:

SaH Classification 4



AGREE

DISAGREE

Override reason:

Higher level service needs

Override reason description:

Description goes here

3. In the **Edit Recommended Classification** window:
 - Select the new recommended classification.
 - Select an override reason.
 - Enter a description explaining the change.
 - Review and action any warning messages that appear.
 - Complete any additional mandatory fields, such as the client's preference for seeking Home Support services.

! An ongoing Support at Home classification outcome cannot be overridden to an ongoing lower or higher SaH classification outcome (in line with section 81-10 of the Aged Care Rules). Assessors must **not** undertake this action and delegates must not approve assessments where this occurs, or override and select a lower or higher classification.

Select **SAVE TO PLAN**.

×

Edit recommended classification

 Please contact the assessor before making any changes to the classification. Some recommendations may be removed as a result of this change. If you want to recommend a Restorative Care Pathway, End-of-Life Pathway or CHSP this will require the assessment to be returned to the assessor to add these services.

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

IAT outcome:

CHSP

Recommended Classification:

SaH Classification 4

Classification type:

Ongoing

New recommended classification *

To override the result, please specify the reason for the override and describe it for the delegate.

Override reason *

Override reason description: * ?

0 / 150

SAVE TO PLAN

CANCEL

4. For Support at Home classifications:

The Edit Home Support Services screen will open and display the default services associated with the selected classification.

Review the service details and update the service, frequency and intensity as needed.

Select **SAVE TO PLAN** at the bottom of the page.

Edit Home Support Services

All fields marked with an asterisk (*) must be completed before submission

Recommended that the client receive: SaH Classification 4

Classification Type: Ongoing

Please select services within each service type*

Allied health and therapy

Service	Frequency	Intensity
☐ Aboriginal or Torres Strait Islander Health Practitioner assistance		▼
☐ Aboriginal or Torres Strait Islander Health Worker assistance		▼
☐ Allied health assistance		▼

5. The updated recommended classification will appear in the **IAT Outcome and Classifications** section of the **Decisions** tab. The update may take up to 60 seconds to display.
6. Clinical Assessment Delegates can correct Residential Permanent recommendations within 43 days of making the decision. During this period, you can:
- Add a Residential Permanent recommendation.
 - Remove a Residential Permanent recommendation.
 - Change the urgency level.
 - Update the approval expiry date.
 - Update emergency needs.
 - Update the Delegate date (approval start date).

Viewing details about existing approvals

1. To view the details and status of a decision for a recommended service, open the **Decisions** tab and go to the **Current Care Approvals** section.

Select the expand icon next to the service, then select the blue **View** (magnifier) icon.

The screenshot shows the 'Support plan and services' interface. The 'Decisions' tab is selected and highlighted with a red box. Below the tabs, the 'Current care approvals' section is highlighted with a red box. It displays details for 'Residential Respite Care' and 'Home support'. The 'Home support' section is further highlighted with a red box, showing a magnifier icon next to the service name. The 'Home support' details include: Classification: Transitioned HCP Level 3, Classification type: Ongoing, Priority category: Standard, and Home support services: Support at Home.

2. A pop-up window will open and display the classification, approval type, and all approved services.

The screenshot shows a pop-up window titled 'Home support services'. It displays the following information: Classification: SaH Classification 4, Classification Type: Ongoing. Below this, there is a list of services with expand icons: Care management, Domestic assistance, Home maintenance and repairs, Home or community general respite, Meals, Nursing care, Nutrition, Personal care, Social support and community engagement, and Transport. A 'CLOSE' button is located at the bottom right of the window.

3. Select the expand icon to view additional details, including: Approved services, Approval start date, and Approval end date.

Home support services

Classification: SaH Classification 2 Classification Type: Ongoing

- Allied health and therapy
- Care management**
 - Home support care management:

Approval starts: 05/05/2025

Agreed
- Domestic assistance
- Home or community general respite**
 - Community and centre-based respite:

Approval starts: 05/05/2025

Agreed
 - Flexible respite:

Approval starts: 05/05/2025

Agreed

CLOSE

Returning an assessment to an assessor

You may need to return an assessment to the assessor in certain situations, including when:

- You need more evidence to support a decision.
- The recommended care level is not appropriate or does not meet the client's needs.
- The assessor needs to correct information, such as spelling errors.
- The assessor needs to review the Integrated Assessment Tool (IAT) data for a Comprehensive Assessment or Home Support Assessment.
- The support plan contains incorrect service approvals.

Select **RETURN TO ASSESSOR** to send the assessment back to the original assessor. The assessor can then update the support plan or review the IAT and resubmit the assessment for a delegate decision.

You can only return an assessment to the assessor **before** you agree or disagree with any recommendations.

If you select **RETURN TO CLIENT**, the system will take you back to the client's record.

ADD A CARE TYPE FOR DELEGATE DECISION

RETURN TO ASSESSOR RETURN TO CLIENT

Follow these steps to return an assessment to the assessor:

- From the **Delegate Decisions** tile, open the **Decisions** tab on the client's **Support Plan and Services** page. Select **RETURN TO ASSESSOR** at the bottom of the page.

Home | Delegate decisions | support plan and services

First Name LAST NAME
Female, 88 years old, DD Month Year AC3XXXXXXXXX1
12 BUNNY STREET WESTON, ACT, 2611
Primary contact: First Name LAST NAME
No support relationships recorded

Support plan and services PRINT COPY OF SUPPORT PLAN

Identified needs | Goals & recommendations | **Decisions** | Manage services & referrals | Associated People

IAT Outcome and Classifications

Recommended care requiring delegate decision

- Recommended that the client receive Meals
- Recommended that the client receive Home maintenance and repairs

Delegate decisions and comments

Assessment: Submitted on 13 April 2026

ADD A SERVICE RECOMMENDATION

RETURN TO ASSESSOR RETURN TO CLIENT

2. The **Return to Assessor** window will open.

If the assessor only needs to review and update the support plan, select **Return Assessment**. You can return an assessment for support plan updates more than once.

Return to assessor

! You are returning this assessment to the assessor. Any decisions you have marked as 'agree' or 'disagree' will be removed and must be actioned again when the assessment is resubmitted.

You are about to return the assessment for Sam Stewart to the assessor with no delegate decision. If you are returning the assessment to the assessor to review and amend data entered into the IAT, please select the checkbox below and then select 'Return Assessment'. If you are returning the assessment to the assessor to review and update the support plan only, please select 'Return Assessment'

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

☐ Does the assessor need to review IAT?

RETURN ASSESSMENT CANCEL

- 1.

A green confirmation message will appear to confirm that the system has returned the support plan to the assessor. The client's card or listing will no longer appear in your **Decision Pending** queue.

✓ The support plan has been returned to the Assessor

3. If you need the assessor to review the **Integrated Assessment Tool (IAT)**, select the **Does the assessor need to review IAT?** checkbox.

The system will display a warning that it will clear any recorded decisions. You can only request an IAT review once.

×

Return to assessor



You are returning this assessment to the assessor. Any decisions you have marked as 'agree' or 'disagree' will be removed and must be actioned again when the assessment is resubmitted.

You are about to return the assessment for Sam Stewart to the assessor with no delegate decision. If you are returning the assessment to the assessor to review and amend data entered into the IAT, please select the checkbox below and then select 'Return Assessment'. If you are returning the assessment to the assessor to review and update the support plan only, please select 'Return Assessment'

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

☐ Does the assessor need to review IAT?

RETURN ASSESSMENT

CANCEL

4. The window will expand to display a section for **IAT review notes**.

The system pre-fills the IAT domain names. Enter your feedback against the relevant IAT domains. You can enter up to 2500 characters.

When you have finished, select **RETURN ASSESSMENT**.

Return to assessor

You are returning this assessment to the assessor. Any decisions you have marked as 'agree' or 'disagree' will be removed and must be actioned again when the assessment is resubmitted.

You can only request a review of the IAT questions once.

You are about to return the assessment for John Smith to the assessor with no delegate decision. If you are returning the assessment to the assessor to review and amend data entered into the IAT, please select the checkbox below and then select 'Return Assessment'. If you are returning the assessment to the assessor to review and update the support plan only, please select 'Return Assessment'.

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

☒ Does the assessor need to amend the IAT?

Instructions: Complete instructions for the assessor against the relevant IAT domains below, outlining the IAT data that needs to be reviewed.

Notes to assessor: *

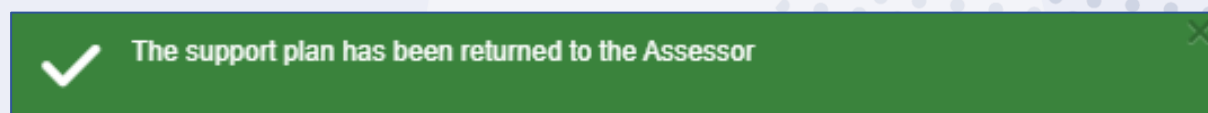
Assessment Details:
Reason for Assessment:
Carer profile:
Medical and Medications:
Function:
Physical, Personal Health & Frailty:
Social:
Cognition:
Behaviour:
Psychological:
Home & Personal Safety:
Financial or Legal:
Support Considerations:
Validated Assessment Tools:
Other:

0/2500

RETURN ASSESSMENT **CANCEL**

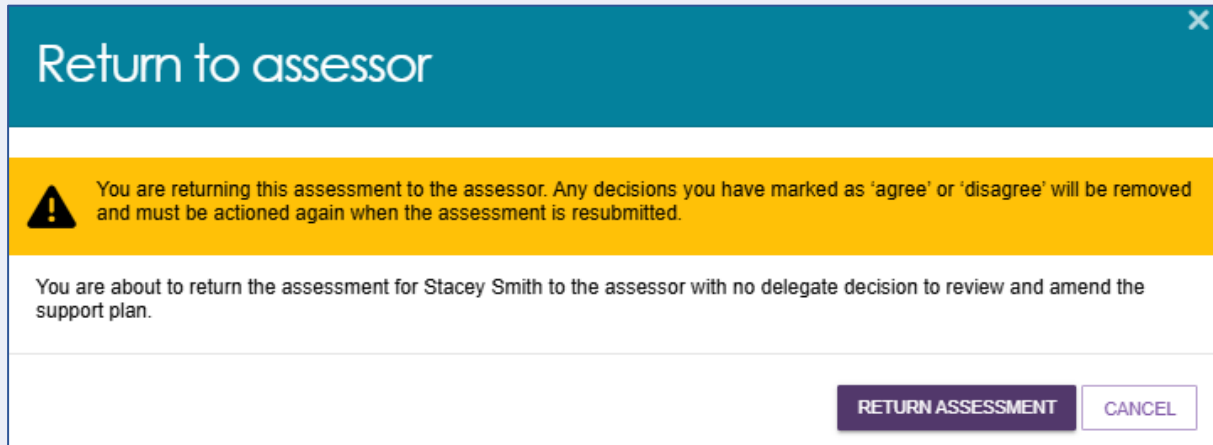
5. A green confirmation message will appear to confirm that the system has returned the support plan to the assessor.

The client's card or listing will no longer appear in your **Decision Pending** queue.



If the assessment has already been returned for an IAT review, the **Return to Assessor** window will:

- Display a warning that the system will clear any recorded decisions.
- Refer only to returning the assessment for **Support Plan** updates.
- No longer display the **Does the assessor need to review IAT?** checkbox.



Return to assessor

! You are returning this assessment to the assessor. Any decisions you have marked as 'agree' or 'disagree' will be removed and must be actioned again when the assessment is resubmitted.

You are about to return the assessment for Stacey Smith to the assessor with no delegate decision to review and amend the support plan.

RETURN ASSESSMENT **CANCEL**

Receiving reviewed IAT from assessor

After the assessor completes the requested changes, finalises the IAT, and resubmits the support plan, you can review the assessor's notes before restarting the decision process.

Follow these steps to review the assessor's IAT changes and restart the decision process:

1. Go to the **Delegate Decisions** tile and open the **Decision Pending** tab. Select the client's card or listing.

Home | Delegate decisions

Decision pending

Currently viewing ABC Outlet

Decision pending Decision history

CARD LIST

Filter by

1 to 2 out of 2 matching results

Sort Decisions Pending by: Last name In order of: Alphabetical (A-Z) GO

My decisions

First Name
LAST NAME

Assessor: First Name Last Name
Delegate: First Name Last Name
Aged care user ID: AXXXXXXXXX1
Delegate Decision due by: DD Month Year

Due in 2 days — Medium

Awaiting Delegate Decision (Assessment)

2. An information message will appear:

'Assessor has reviewed the IAT questionnaire as per delegate's request. Please refer to the Notes to delegate on the IAT review below for details'.

Select **VIEW DETAILS** under **Notes to Delegate on the IAT Review**.

First Name LAST NAME

Assessor has reviewed the IAT questionnaire as per delegate's request. Please refer to the Notes to delegate on the IAT review below for details.

Aged 83 (DD Month Year), Female Referred from Aged Care Gateway on DD Month Year
Accepted on DD Month Year

Assessor First Name Last Name
Delegate First Name Last Name
Date submitted DD Month Year

Delegate Decision due by: DD Month Year

Notes to delegate on the IAT review
[VIEW DETAILS](#)

Assessment details

Assessment type Comprehensive Assessment
Assessment reason the client has needs that exceed a basic support programme
Assessment setting Non-Hospital

Recommended care:

- Transport
- Personal care
- Meals
- Residential Permanent
- Domestic assistance

[VIEW SUPPORT PLAN](#) [VIEW FULL CLIENT RECORD](#) [VIEW CLIENT REPORT](#)

[START DECISION PROCESS](#) [REASSIGN](#)

3. The **Notes to Delegate on the IAT Review** window will open.

You can:

- View the assessor's notes at the top of the window.
- View the original delegate notes below.
- Select the expand icon to open or collapse each section.

Select **CLOSE** to return to the client's record.

4. From the client's card or list view, select **START DECISION PROCESS** to begin or continue the decision process. The **Decisions** page will display:

- The updated support plan, if the assessor made changes.
- The updated IAT outcome.
- The previous IAT outcome, where applicable.

You can also view the assessor's IAT review notes from this page. Select the link in the information message: 'Assessor has reviewed the IAT questionnaire as per delegate's request. View the Notes to delegate on the IAT review [here](#)'.

here'. Below the information message, there are fields for 'Current assessment type' (Comprehensive Assessment), 'IAT Outcome' (CHSP, highlighted with a red box), 'Previous IAT Outcome' (CHSP), and 'Recommended classification' (CHSP). At the bottom, there are 'AGREE' and 'DISAGREE' buttons."/>

No Care Approval and No Change to Existing Care Approvals

You can add a recommendation for **No Care Approval** or **No Change to Existing Care Approvals** when completing a Home Support Assessment or a Comprehensive Assessment.

The No Care Approval and No Change to Existing Care Approvals buttons are available in the **Goals & Recommendations** tab of the client's Support Plan and Services page. The system may also display these options while you are adding a goal.

No Care Approval is available when the client has no existing care approvals.

No Change to Existing Care Approvals is available when the client already has care approvals in place.

The image below shows the Add No Change to Existing Care Approvals button in the Other Recommendations section of the client's Goals & Recommendations tab.

This image below shows the **Add No Care Approval** button, in both the Goal section and in the Other Recommendations section of the client's Support Plan and Services page.

Assessors can recommend **No Care Approval** or **No Change to Existing Care Approvals** while completing an assessment. These recommendations require a delegate decision.

Assessors cannot add **No Care Approval** or **No Change to Existing Care Approvals** during the support period or as part of a support plan review.

Clinical Delegate workflow process

Clinical Assessment Delegates can approve older people for all service groups, classification types and classification levels under the Aged Care Act 2024.

! Clinical Delegate requirements for Comprehensive (CHSP only) assessment outcomes

When a Comprehensive Assessment results in a CHSP-only outcome, a Clinical Assessment Delegate who did not complete the assessment must approve the recommendation.

A clinical assessor must not approve their own comprehensive assessment.

All comprehensive assessments require separation between the assessor and delegate roles. This separation helps maintain appropriate clinical governance and oversight.

An assessor can also act as the delegate only when they complete a **Home Support Assessment** that results in a **CHSP-only recommendation**.

! Clinical Assessment Delegates can also approve entry-level home support services. Organisations may choose to assign Home Support Assessments to Clinical Assessment Delegates instead of Non-clinical Assessment Delegates.

Agreeing with recommendations

1. To approve a recommendation made by the Clinical Assessor for a service other than Support at Home (such as Residential Care, Transition Care Program (TCP) or CHSP), select **AGREE** under the recommended care type. If the assessor has recommended more than one care type, repeat this step for each recommendation.
1. To approve a Support at Home service recommendation, refer to [Agreeing or disagreeing with a Support at Home Recommendation](#).

First Name Last Name
Female, 66 years old, DD Month Year, ACXXXXXXX1
11TEST STREET, SUBURB / VIC, 3304
Prefers to speak Italian

Primary contact First Name Last Name
No support relationships recorded

IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment
IAT Outcome: SaH Classification 4
Recommended classification: SaH Classification 4 Agreed [CHANGE](#)
HM Medium

Recommended care requiring delegate decision

Residential Respite Care

Priority for this care type: High

Declaration: Yes

Reason DEMMI not completed: information unavailable. Need to follow up in 1 week

This recommendation is awaiting delegate decision

[AGREE](#) [DISAGREE](#)

Residential Permanent

Urgency for this care type: Medium

Agreed

[CHANGE](#)

[ADD A CARE TYPE FOR DELEGATE DECISION](#) [RECOMMEND AN ASSISTIVE TECHNOLOGY](#)

Recommend that the client receive Home support

Recommend that the client receive Home modifications

This recommendation requires a delegate decision

Home Modification Tier: HM Medium
Classification type: Short-term
Home modifications services: **Home adjustments:** Home modification products, Home modifications prescription and clinical support

[AGREE](#) [DISAGREE](#)

2. A confirmation window will ask you to confirm that you approve the recommendation. If needed, enter an approval end date and add comments.

Select **AGREE** to record your decision.

Agree with recommendation

You are about to agree with the recommendation for First Name LAST NAME for Residential Respite Care

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

Approval cease date:

(e.g. dd/mm/yyyy)

Comments (optional)
 Maximum 255 characters

[AGREE](#) [CANCEL](#)

- A confirmation message will appear, and the recommendation status will change to **Agreed**.

Residential Permanent

Urgency for this care type Medium 

Approval starts 26 May 2025

Approval stops 30 September 2025




 Agreed

CHANGE

! Reissuing CHSP Referrals for Urgent Services

Clients who receive urgent services must complete an assessment. If the assessment approves ongoing CHSP services, the system must generate new referrals for those services.

- CHSP providers can continue delivering urgent services until the assessment is complete.
- Once the delegate approves ongoing CHSP services, the urgent service referral should end.
- The system must generate new CHSP referrals before the provider can continue delivering services on an ongoing basis.

If the delegate does not approve the urgent service:

- The system will recall the direct-to-provider referral if the provider has not started the service.
- If the provider has already started the service, the system will notify the provider that the urgent service is not approved and that they must stop delivering the service.

Disagreeing with recommendations

Disagreeing with a recommendation means you do not approve the recommended care type.

If the assessor adds a recommendation in error, you can disagree with that recommendation and, if needed, add a different recommendation.

- ! An ongoing Support at Home classification outcome cannot be overridden to an ongoing lower or higher SaH classification outcome (in line with section 81-10 of the Aged Care Rules). Assessors must **not** undertake this action and delegates must not approve assessments where this occurs, or override and select a lower or higher classification.

Recommended care requiring delegate decision

Residential Respite Care

Priority for this care type: High ?

Declaration: Yes

Reason DEMMI not completed: information unavailable. Need to follow up in 1 week

Delegate comment: Not required

Disagreed

CHANGE

Residential Permanent

Urgency for this care type: Medium ?

Agreed

CHANGE

Follow the steps below to disagree with a recommendation:

1. Select the expand button to view the recommended care type.

Recommended care requiring delegate decision

Recommend that the client receive Home support

Recommend that the client receive Home modifications

ADD A CARE TYPE FOR DELEGATE DECISION RECOMMEND AN ASSISTIVE TECHNOLOGY

RETURN TO ASSESSOR RETURN TO CLIENT

2. Select **DISAGREE** below the recommended care type.

If you disagree with more than one recommended care type, repeat this step for each recommendation.

Support plan and services

Identified needs Goals & recommendations Decisions Manage services & referrals Associated People

IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment

IAT Outcome: SAH Classification 5

Recommended classification: SAH Classification 5 Agreed CHANGE

Specified needs - Continence Products HM Medium

Override reason: Other Aged Care Program/s

Override reason description: Needs to be overridden to propose services.

Recommended care requiring delegate decision

Recommend that the client receive Home support

Recommend that the client receive Home modifications

Recommend that the client receive Assistive technology

This recommendation requires a delegate decision

Specified Needs: Specified needs - Continence Products

Classification type: Ongoing

Assistive technology services: Equipment and products: Assistive technology prescription and clinical support, Communication and information management products, Domestic life products, Managing body functions, Mobility products, Self-care products

AGREE **DISAGREE**

ADD A CARE TYPE FOR DELEGATE DECISION RECOMMEND AN ASSISTIVE TECHNOLOGY

RETURN TO ASSESSOR RETURN TO CLIENT

3. Enter a comment explaining why you disagree with the recommendation, then select **DISAGREE**.

Disagree with Assistive Technology

You are about to disagree with the Assistive Technology classification and all associated services.
All fields marked with an asterisk (*) are required.

Classification type: Ongoing
Specified needs: Specified needs - Continence Products
Service type: Equipment and products

- ☒ Assistive technology prescription and clinical support
- ☒ Communication and information management products
- ☒ Domestic life products
- ☒ Mobility products
- ☒ Self-care products
- ☒ Managing body functions

Reason for disagreement: *
Recommendation was incorrectly applied by assessor

DISAGREE CANCEL

4. A confirmation message will appear, and the recommendation status will change to **Disagreed**.

Recommended care requiring delegate decision

Recommend that the client receive
Home support

Recommend that the client receive
Home modifications

Recommend that the client receive
Assistive technology

Specified Needs: Specified needs - Continence Products
Classification type: Ongoing
Assistive technology services: Equipment and products: Assistive technology prescription and clinical support, Communication and information management products, Domestic life products, Managing body functions, Mobility products, Self-care products

Disagreed

CHANGE

ADD A CARE TYPE FOR DELEGATE DECISION RECOMMEND AN ASSISTIVE TECHNOLOGY

RETURN TO ASSESSOR RETURN TO CLIENT

✓ Your request has successfully been processed.

5. If you need to update your decision, select **CHANGE**. You can only use this option before you complete the approval process by selecting **Save and Delegate**. Refer to the [Changing a Decision](#) section for more information.

Change decision

You are about to change the recommendation from agreed to **disagreed** for Maria MANNING for Residential Permanent

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

Comments or reason for disagreement *
Maximum 255 characters

CHANGE CANCEL

6. If you disagree with all recommendations and do not add any new approval decisions, the **Save Decision and Delegate** window may prompt you to select **No Care Approval** before you can complete the delegate decision. Go to [No Care Approval and No Change to Existing Care Approvals](#) for more information.

Agreeing or disagreeing with a Support at Home Recommendation

Follow these steps to apply a delegate decision for a client with a recommended Support at Home classification:

1. In the **Recommend that the client receive Home Support** section, select **APPLY DELEGATE DECISION**.

2. Review the assessor's recommended services, including the service type, service, frequency and intensity.

You can:

- Select individual services.

- Select multiple services.
- Use **Select All** to select all services.

Then select:

- **AGREE WITH SELECTED SERVICES**, or
- **DISAGREE WITH SELECTED SERVICES**.

 **Apply delegate decision for home support services**

Recommended that the client receive: SaH Classification 2
Classification type: Ongoing

☐ Select all

Service type	Service	Frequency	Intensity	Recommended to	Decision	Select
 Care management	Home support care management			Add new service	● Disagreed	☐
 Domestic assistance	General house cleaning			Add new service	● Agreed	☐
 Domestic assistance	Laundry services			Add new service	● Disagreed	☐
 Domestic assistance	Shopping assistance			Add new service	● Pending	☒
 Home maintenance and repairs	Assistance with home maintenance and repairs			Add new service	● Pending	☒
 Home maintenance and repairs	Expenses for home maintenance and repairs			Add new service	● Pending	☒
 Home maintenance and repairs	Gardening			Add new service	● Agreed	☐

3. To review or update an individual service, select the expand icon and then choose **AGREE**, **DISAGREE** or **UPDATE SERVICE**.

 Domestic assistance

Shopping assistance

Add new service ● Pending ☒

If you select **UPDATE SERVICE**, you can add or change the service frequency and intensity. Select **UPDATE** to save your changes.

Update service

You are about to update the service **Shopping assistance**

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

Service type Domestic assistance

Service Shopping assistance

Frequency: *

1

Intensity: *

Days per week

The system will display the updated frequency and intensity on the **Apply Delegate Decision for Home Support Services** page.

Service type	Service	Frequency	Intensity	Recommended to	Decision	Select
 Care management	Home support care management	2	Hours per month	Add new service	● Agreed	☐
 Domestic assistance	General house cleaning	4	Hours per week	Add new service	● Agreed	☐
 Domestic assistance	Laundry services	2	Days per week	Add new service	● Agreed	☐

4. If you disagree with one or more recommended services, select **DISAGREE WITH**

SELECTED SERVICES. Enter the reason for your decision and then select **DISAGREE**.

Disagree with selected services

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

You are about to disagree with the service recommendations listed below

- Home or community general respite**
 - Community and centre-based respite: Recommended frequency is 2 days per month. Recommendation to: add service
- Nutrition**
 - Nutrition supports: Recommended frequency is 2 time(s) per day. Recommendation to: add service
- Domestic assistance**
 - Shopping assistance: Recommended frequency is 2 time(s) per year. Recommendation to: add service
- Home maintenance and repairs**
 - Assistance with home maintenance and repairs: Recommended frequency is 3 time(s) per year. Recommendation to: add service
- Social support and community engagement**
 - Group social support: Recommended frequency is 3 days per week. Recommendation to: add service

Reason for disagreement: *

Recommendation was incorrectly applied by assessor.

DISAGREE **CANCEL**

5. If you agree with one or more recommended services, select the relevant service checkboxes and then select **AGREE WITH SELECTED SERVICES**.

The system will include any frequency or intensity changes you made.

If you select a service that you previously disagreed with, the system will replace your earlier decision.

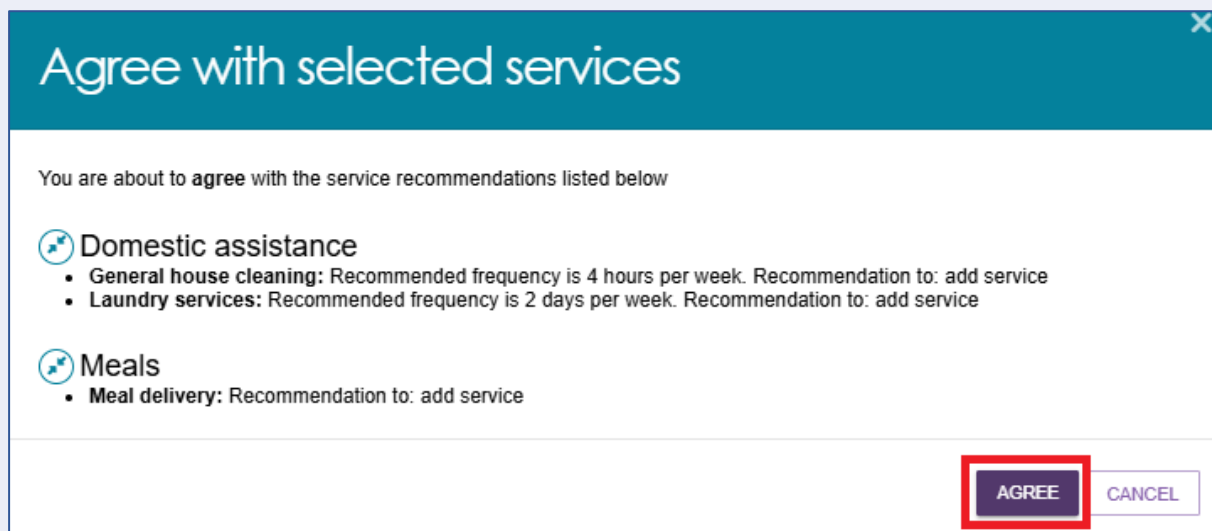
Apply delegate decision for home support services

Recommended that the client receive: SaH Classification 3
Classification type: Ongoing

AGREE WITH SELECTED SERVICES **DISAGREE WITH SELECTED SERVICES** ☐ Select all

Service type	Service	Frequency	Intensity	Recommended to	Decision	Select
Care management	Home support care management	2	Hours per month	Add new service	Agreed	☐
Domestic assistance	General house cleaning	4	Hours per week	Add new service	Disagreed	☒
Domestic assistance	Laundry services	2	Days per week	Add new service	Disagreed	☒
Domestic assistance	Shopping assistance			Add new service	Agreed	☐
Home maintenance and repairs	Assistance with home maintenance and repairs			Add new service	Disagreed	☐
Home maintenance and repairs	Expenses for home maintenance and repairs			Add new service	Agreed	☐
Home maintenance and repairs	Gardening			Add new service	Disagreed	☐
Home or community general respite	Community and centre-based respite			Add new service	Agreed	☐
Home or community general respite	Flexible respite			Add new service	Agreed	☐
Meals	Meal delivery			Add new service	Disagreed	☒

Select **AGREE** to confirm.



Agree with selected services

You are about to agree with the service recommendations listed below

- Domestic assistance**
 - General house cleaning:** Recommended frequency is 4 hours per week. Recommendation to: add service
 - Laundry services:** Recommended frequency is 2 days per week. Recommendation to: add service
- Meals**
 - Meal delivery:** Recommendation to: add service

AGREE **CANCEL**

6. To add Support at Home services that the assessor did not recommend, select **ADD HOME SUPPORT SERVICES** at the bottom of the page.



Social support and community engagement

FINISH **ADD HOME SUPPORT SERVICES** **CANCEL**

- 7.

8. The **Add Home Support Services** page will open. Add the required services, frequencies and intensities, then select **SAVE TO PLAN**.

Service	Frequency	Intensity
☐ Podiatry		
☒ Social work	2	Time(s) per year
☐ Speech pathology		
☐ Physiotherapy		
☐ Psychology		
☐ Music therapy		
☐ Diet or nutrition		
☒ Allied health assistance	2	Days per month
☐ Aboriginal or Torres Strait Islander Health Practitioner assistance		
☐ Aboriginal or Torres Strait Islander Health Worker assistance		
☐ Exercise physiology		
☒ Occupational therapy	2	Days per week
☐ Counselling or psychotherapy		

SAVE TO PLAN CANCEL

9. Review the services you added and select **FINISH** when you are ready to continue.

Allied health and therapy Allied health assistance

FINISH ADD HOME SUPPORT SERVICES CANCEL

10. The system will return you to the **Decisions** tab of the client's **Support Plan and Services** page.

At this stage, the **Recommend that the client receive Home Support** section still displays the assessor's original recommendations.

To review your delegate decisions, select the **View** (magnifying glass) icon.

When you are satisfied with your decisions, select **SAVE AND DELEGATE** at the bottom of the page.

Recommended care requiring delegate decision

☒ Recommend that the client receive Residential Respite Care

☒ Recommend that the client receive Home support

☒ Recommend that the client receive Assistive technology

Classification: SaH Classification 3
Classification type: Ongoing
Client's preference for Home support services: Seeking services

Home support services:

Care management: Home support care management
Domestic assistance: General house cleaning, Laundry services, Shopping assistance
Home maintenance and repairs: Assistance with home maintenance and repairs, Expenses for home maintenance and repairs, Gardening
Home or community general respite: Community and centre-based respite, Flexible respite
Meals: Meal delivery, Meal preparation
Nursing care: Enrolled nurse clinical care, Nursing assistant clinical care, Nursing care consumables, Registered nurse clinical care
Personal care: Assistance with self-administration of medications, Assistance with self-care and activities of daily living, Continence management (non-clinical)
Social support and community engagement: Accompanied activities, Assistance to maintain personal affairs, Cultural support, Digital education and support, Expenses to maintain personal affairs, Group social support, Individual social support
Transport: Direct transport, Indirect transport

CHANGE

CHANGE

ADD A SERVICE RECOMMENDATION ADD A CARE TYPE FOR DELEGATE DECISION ADD NO CARE APPROVAL RECOMMEND AN ASSISTIVE TECHNOLOGY RECOMMEND HOME MODIFICATIONS

SAVE AND DELEGATE RETURN TO ASSESSOR RETURN TO CLIENT

11. The **Save Decision and Delegate** window will open.

The window displays:

- Services you approved, including any updated frequencies and intensities.
- Services you did not approve.

Enter the delegation date and select **SAVE DECISION**.

Save decision and delegate

You are about to save the delegate decision under the *Aged Care Act 2024* for Gerry Grant.

The following care was **agreed**:

- Home support Ongoing - SaH Classification 3
 - Care management:**
 - Home support care management : Recommended frequency is 2 hours per month.
 - Domestic assistance:**
 - General house cleaning : Recommended frequency is 4 hours per week.
 - Laundry services : Recommended frequency is 2 days per week.
 - Shopping assistance
 - Home maintenance and repairs:** Assistance with home maintenance and repairs, Expenses for home maintenance and repairs, Gardening
 - Home or community general respite:** Community and centre-based respite, Flexible respite
 - Meals:** Meal delivery, Meal preparation
 - Personal care:** Assistance with self-administration of medications, Assistance with self-care and activities of daily living, Continence management (non-clinical)
 - Social support and community engagement:** Accompanied activities, Assistance to maintain personal affairs, Cultural support, Digital education and support, Expenses to maintain personal affairs, Group social support, Individual social support
 - Transport:** Indirect transport

The following care was **not agreed**:

- Home support Ongoing - SaH Classification 3
 - Nursing care:** Enrolled nurse clinical care, Nursing assistant clinical care, Nursing care consumables, Registered nurse clinical care
 - Transport:** Direct transport

Delegation date *
28/05/2026

SAVE DECISION **CANCEL**

The **Support Plan and Services** page will display the approval start date.

You can now [generate Notice of Decision letters](#), and [Request/change notification of Support at Home correspondence](#).

Editing a recommendation

1. To change a care type or level of care recommended by the assessor, select the *Edit* icon next to the recommendation.

Recommended care requiring delegate decision

Residential Permanent

Urgency for this care type Low ?

Agreed

CHANGE

2. The **Edit Care Type** window will open. Update the recommendation as needed, then select **SAVE TO PLAN** to save your changes.

Edit a care type

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

Which care type applies?

Residential Permanent

☒ Shared room + ensuite

☐ Shared room + no bathroom or ensuite

☐ Shared room + shared bathroom

☐ Single room + ensuite

☐ Single room + no bathroom or ensuite

☐ Single room + shared bathroom

If time-limited, when does the approval stop (optional)

(e.g. dd/mm/yyyy)

What is the urgency of this care type? *

Low

Is this emergency care?

☐ Yes ☒ No

Reason or comments

0 / 255

SAVE TO PLAN CANCEL

Adding a care type

Assessment Delegates can add an additional care type for delegate decision when needed.

1. In the **Decisions** tab of the client's **Support Plan and Services** page, select **ADD A CARE TYPE FOR DELEGATE DECISION** at the bottom of the page.

First Name Last Name
Male, 81 years old, DD Month Year ACXXXXXXXXX1
742 TEST STREET, SUBURB VIC, 3544

Primary contact: First Name Last Name
No support relationships recorded

Support plan and services PRINT COPY OF SUPPORT PLAN

Identified needs Goals & recommendations **Decisions** Manage services & referrals Associated People

IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment
IAT Outcome: SaH Classification 5
Recommended classification: SaH Classification 5 Agreed CHANGE
Specified needs - Continence Products
HM Medium
Override reason: Other Aged Care Programs
Override reason description: Needs to be overridden to propose services.

Recommended care requiring delegate decision

Recommend that the client receive
Home support

Recommend that the client receive
Home modifications

Recommend that the client receive
Assistive technology

ADD A CARE TYPE FOR DELEGATE DECISION RECOMMEND AN ASSISTIVE TECHNOLOGY

SAVE AND DELEGATE RETURN TO ASSESSOR RETURN TO CLIENT

2. In the pop-up window, select the appropriate care type from the drop-down list. Then select the priority for the care type. (The list includes some historical care types. Only use these care types in approved circumstances).

3. The system will add the care type to the **Recommended Care Requiring Delegate Decision** list and mark the decision as **Agreed**.

Recommending a Home Modification Service under Support at Home

! When considering adding/editing Home modifications care recommendations, refer to:

- *Support Plan* section of [My Aged Care – Integrated Assessment Tool \(IAT\) User Guide](#)
- *Approving AT and HM under Support at Home and Approving AT and HM under CHSP* sections under Chapter 8 of the [My Aged Care Assessment Manual](#)
- Delegate training.

As a Delegate, you can recommend a Home Modification (HM) service when an assessment shows that changes to the client's home are needed to support their safety, independence, or ability to remain at home. Follow these steps to add a Home Modification recommendation:

1. From the **Decisions** tab, select **RECOMMEND HOME MODIFICATIONS**.

Support plan and services

Identified needs | Goals & recommendations | **Decisions** | Manage services & referrals | Associated People | Review

IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment
 IAT Outcome: SaH Classification 3
 Recommended classification: SaH Classification 3 **Agreed** [CHANGE](#)

Recommended care requiring delegate decision

Recommend that the client receive
Home support

[ADD A CARE TYPE FOR DELEGATE DECISION](#) [RECOMMEND AN ASSISTIVE TECHNOLOGY](#) [RECOMMEND HOME MODIFICATIONS](#)

[RETURN TO ASSESSOR](#) [RETURN TO CLIENT](#)

The

Add Home Modifications Recommendation screen will open.

- Select the appropriate Home Modification tier (**Low**, **Medium**, or **High**) from the drop-down list.
- The **Service Type** field will appear pre-filled and cannot be changed.
- Indicate whether the client wants to seek Home Modification services through the **Support at Home** program.

Select **SAVE TO PLAN** to add the recommendation.

Add Home modifications recommendation

The client's preference for seeking Home modifications services determines whether they are active in the AT-HM Priority System.

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

Home modifications tier*
 HM Medium

Service Type*
 Home adjustments

☒ Home modification products
☒ Home modifications prescription and clinical support

The client's preference for seeking Home modifications services through the Support at Home program is:*
☒ Seeking services ☐ Not seeking services

[SAVE TO PLAN](#) [CANCEL](#)

Recommending an Assistive Technology Service under Support at Home

! When considering adding/editing Assistive technology care recommendations, refer to:

- *Support Plan* section of [My Aged Care – Integrated Assessment Tool \(IAT\) User Guide](#)
- *Approving AT and HM under Support at Home* and *Approving AT and HM under CHSP* sections under Chapter 8 of the [My Aged Care Assessment Manual](#)
- Delegate training.

As an Assessment Delegate, you can recommend an Assistive technology service when the client's assessment identifies a need for equipment or devices that support daily living, safety or independence. These services help clients live safely and independently at home.

Assistance Dogs are included under the Ongoing Assistive technology classification. In the system, this service is listed as Specified Needs – Assistance Dogs.

Follow these steps to add an Assistive technology recommendation:

From the Decisions tab, select **RECOMMEND AN ASSISTIVE TECHNOLOGY**.

1. The **Add Assistive technology recommendation** screen appears.

Select the classification type from the drop down list.

If the classification type is Short-term, select the technology tier from the drop-down list. If it is Ongoing, assistance dogs is available under the Specified Needs section.

Choose whether the client want to seek Assistive technology services through the Support at Home program. Then, select **SAVE TO PLAN**.

Assistive Technology Short Term example

Add Assistive technology recommendation

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

Classification type *

Ongoing

Specified needs *

Specified needs - Assistance Dogs

Service Type *

Equipment and products

- ☒ Assistive technology prescription and clinical support
- ☒ Communication and information management products
- ☒ Domestic life products
- ☒ Managing body functions
- ☒ Mobility products
- ☒ Self-care products

The client's preference for seeking Assistive technology services through the Support at Home program is:*

☒ Seeking services ☐ Not seeking services

SAVE TO PLAN

CANCEL

- The recommendation will be displayed within the Decisions tab under **Recommended care requiring delegate decision** section. Expand the item to view the details. Select **AGREE** or **DISAGREE**. You can also edit the recommendation using the **Edit** (Pencil) icon as shown in the example below.

Recommended care requiring delegate decision

Home Care Package Level 2

The Home Care Packages (HCP) program is now the Support at Home program. On 1 July 2025, the HCP Program transitioned to the Support at Home program. [Learn more](#)

Client's preference for home care services: Seeking services

[CHANGE](#)

☒ Agreed

[CHANGE](#)

Recommend that the client receive

Home support

[ADD A CARE TYPE FOR DELEGATE DECISION](#) [RECOMMEND AN ASSISTIVE TECHNOLOGY](#) [RECOMMEND A HOME MODIFICATION](#)

[RETURN TO ASSESSOR](#) [RETURN TO CLIENT](#)

Recommend that the client receive

Assistive technology

This recommendation requires a delegate decision

Assistive Technology Tier: AT Medium

Classification type: Short-term

Assistive technology services:

[AGREE](#) [DISAGREE](#)

Recommending a second Restorative Care Pathway unit

! A delegate should not approve both a client's Restorative Care Pathway (including any associated Assistive Technology and Home Modification recommendations) and the client's support plan review.

A different delegate should approve the support plan review wherever possible.

A delegate may approve both only if they can confirm that no other delegate is available to make the approval decision.

Clinical Assessment Delegates can add a second Restorative Care Pathway (RCP) unit during the delegate decision process when a client is already receiving a Restorative Care Pathway and is undergoing a Support Plan Review.

A limited number of RCP units are available each financial quarter. When considering a second RCP unit, assessors and delegates should monitor departmental communications about RCP unit availability before making a recommendation or approval decision.

! Delegates must not add a second Restorative Care Pathway unit if the participant has not started their first Restorative Care episode.

1. From the Assessor Portal home page, select the **Delegate Decisions** tile.
2. Select the client who requires a second RCP unit. The client must already have an approved and active Restorative Care Pathway.
3. Open the client's support plan, select the **Decisions** tab, and then go to the **IAT Outcome and Classification** section. Then, select **ADD SECOND UNIT OF RESTORATIVE CARE PATHWAY**.
4. The **Add Second Unit of Restorative Care Pathway** window will open. Review the information provided, then select **ADD SECOND UNIT**.

The screenshot shows the 'Support plan and services' interface with the 'Decisions' tab selected. Under 'IAT Outcome and Classifications', the 'Current assessment type' is 'Comprehensive Assessment', 'AT outcome' is 'Sah Classification 3', and 'Recommended classification' is 'AT High' and 'HMF Medium'. The 'Existing classification' shows 'Sah Restorative Care Pathway', 'AT Medium', and 'HMF Low'. A button 'ADD SECOND UNIT OF RESTORATIVE CARE PATHWAY' is visible. Below this, a section titled 'Recommended care requiring delegate decision' displays a modal window titled 'Add second unit of Restorative Care Pathway'. The modal contains the text: 'The additional funding will be added to the client's existing Sah Restorative Care Pathway episode. The client can utilise this additional funding and any of their remaining funding until the end of their Restorative Care Pathway episode'. At the bottom of the modal, there are two buttons: 'ADD SECOND UNIT' (highlighted with a red box) and 'CANCEL'.

5. The second RCP unit will appear in the client's **Current Care Approvals** section. The system will also record your decision in the **Delegate Decisions and Comments** section.



Support plan and services

Identified needs

Goals & recommendations

Decisions

Manage services & referrals

Associated People

IAT Outcome and Classifications

Current assessment type: Home Support Assessment
 IAT Outcome: CHSP
 Recommended classification: SaH Restorative Care Pathway (Second Unit)

Current care approvals



Recommended that the client receive

18 August 2025

Support at Home

Classification or pathway: SaH Restorative Care Pathway (Second Unit)

Classification type: Short-term

Priority category: Medium

Client's preference for Home support services: Seeking services

Home support services: **Home maintenance and repairs:** Gardening, Assistance with home maintenance and repairs, Expenses for home maintenance and repairs

Personal care: Assistance with self-care and activities of daily living, Assistance with the self-administration of medication, Continence management (non-clinical)

Transport: Direct transport, Indirect transport



Delegate decisions and comments

Assessment: Submitted on 18 August 2025

Decisions



Recommended that the client receive

18 August 2025

Support at Home

Classification or pathway: SaH Restorative Care Pathway (Second Unit)

Classification type: Short-term

Urgency for this care type: Medium

Client's preference for Home support services: Seeking services

Home support services: **Home maintenance and repairs:** Gardening, Assistance with home maintenance and repairs, Expenses for home maintenance and repairs

Personal care: Assistance with self-care and activities of daily living, Assistance with the self-administration of medication, Continence management (non-clinical)

Transport: Direct transport, Indirect transport



Approval start: 18 August 2025

Agreed

Changing a decision

1. If you need to change your decision from Agreed to Disagreed, or Disagreed to Agreed, select **CHANGE**.

Support plan and services PRINT COPY OF SUPPORT PLAN

Identified needs | **Goals and recommendations** | **Decisions** | Manage services & referrals | Associated People

IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment
 IAT Outcome: SaH Classification 5
 Recommended classification: SaH Classification 5 Agreed CHANGE
 Specified needs - Continence Products
 HM Medium
 Override reason: Other Aged Care Program/s
 Override reason description: Needs to be overridden to propose services.

Recommended care requiring delegate decision

Recommend that the client receive
 Home support ✓
 Home modifications ✓

Recommend that the client receive
 Assistive technology ✓
 Specified Needs: Specified needs - Continence Products
 Classification type: Ongoing
 Assistive technology services: Equipment and products: Assistive technology prescription and clinical support, Communication and information management products, Domestic life products, Managing body functions, Mobility products, Self-care products
Disagreed CHANGE

ADD A CARE TYPE FOR DELEGATE DECISION | RECOMMEND AN ASSISTIVE TECHNOLOGY
 RETURN TO ASSESSOR | RETURN TO CLIENT

2. In the pop-up window, enter an approval end date and add comments if required.

Change decision

You are about to change the recommendation from agreed to disagreed for Bart SAMPSON for Residential Permanent

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

Comments or reason for disagreement *
 Maximum 255 characters

CHANGE CANCEL

3. If you change the decision from Agreed to Disagreed, enter a reason for the change.
 You can only change a decision before you complete the approval process by selecting Save and Delegate.
4. A confirmation message will appear.

✓ • Recommendation successfully updated.

Editing a recommended classification

1. Go to the **Delegate Decisions** tile and open the client record as described in [Viewing Decisions information](#).
2. Select the **Edit** (pencil) icon next to the current recommended classification.

IAT Outcome and Classifications

Current assessment type:

Comprehensive Assessment

IAT Outcome:

CHSP

Recommended classification:

SaH Classification 4



AGREE

DISAGREE

Override reason:

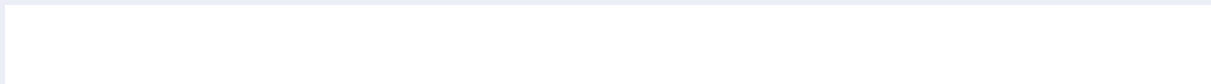
Higher level service needs

Override reason description:

Description goes here

3. The **Edit Recommended Classification** window will open.
 - Select the new recommended classification.
 - Select an override reason.
 - Enter a description explaining the change.
 - Review and action any warning messages that appear.
 - Complete any additional mandatory fields, such as the client's preference for seeking Home Support services.

Select **SAVE TO PLAN** to save your changes.



Edit recommended classification


Please contact the assessor before making any changes to the classification. Some recommendations may be removed as a result of this change. If you want to recommend a Restorative Care Pathway, End-of-Life Pathway or CHSP this will require the assessment to be returned to the assessor to add these services.

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

IAT outcome: CHSP

Recommended Classification: SaH Classification 4

Classification type: Ongoing

New recommended classification *

To override the result, please specify the reason for the override and describe it for the delegate.

Override reason *

Override reason description: * ?

0 / 150

SAVE TO PLAN
CANCEL

! An ongoing Support at Home classification outcome cannot be overridden to an ongoing lower or higher SaH classification outcome (in line with section 81-10 of the Aged Care Rules). Assessors must **not** undertake this action and delegates must not approve assessments where this occurs, or override and select a lower or higher classification.

4. If you select a **Support at Home** classification, the **Edit Home Support Services** screen will open.
 - Review the default services for the selected classification.
 - Confirm or update the service, frequency and intensity details.
 - Select **SAVE TO PLAN** at the bottom of the page.

Edit Home Support Services

All fields marked with an asterisk (*) must be completed before submission

Recommended that the client receive: SaH Classification 4
Classification Type: Ongoing

Please select services within each service type*

Allied health and therapy

Service	Frequency	Intensity
☐ Aboriginal or Torres Strait Islander Health Practitioner assistance		▼
☐ Aboriginal or Torres Strait Islander Health Worker assistance		▼
☐ Allied health assistance		▼

5. The updated recommended classification will appear in the **IAT Outcome and Classifications** section of the **Decisions** tab. The update may take up to 60 seconds to display.

Support plan and services

GO TO THE ASSESSMENT FLAG AS END-OF-LIFE PRINT COPY OF SUPPORT PLAN

Identified needs Goals & recommendations Decisions Manage services & referrals Associated People Review

IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment

IAT Outcome: SaH Classification 2

Recommended classification: SaH Classification 4

Override reason: Higher level service needs

Override reason description: Override description goes here

- 6.
7. Clinical Assessment Delegates can correct **Residential Permanent** recommendations within 43 days of making the decision. During this period, you can:
- Add a Residential Permanent recommendation.
 - Remove a Residential Permanent recommendation.
 - Change the urgency level.
 - Update the approval expiry date.
 - Update emergency needs.
 - Update the Delegate date (approval start date).

Finalising your decision

Follow these steps to save and complete your delegate decision:

1. After you have reviewed and recorded all decisions, select **SAVE AND DELEGATE**.

Support plan and services

Identified needs | Goals & recommendations | **Decisions** | Manage services & referrals | Associated People

IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment
 IAT Outcome: SaH Classification 5
 Recommended classification: SaH Classification 5 Agreed CHANGE
 Specified needs - Continence Products
 HM Medium
 Override reason: Other Aged Care Program/s
 Override reason description: Needs to be overridden to propose services.

Recommended care requiring delegate decision

Residential Permanent
 • Single room + ensuite
 Urgency for this care type: High
Agreed
CHANGE

Recommend that the client receive
Home support

Recommend that the client receive
Home modifications

Recommend that the client receive
Assistive technology

ADD A CARE TYPE FOR DELEGATE DECISION RECOMMEND AN ASSISTIVE TECHNOLOGY
SAVE AND DELEGATE RETURN TO ASSESSOR RETURN TO CLIENT

2. The **Save Decision and Delegate** window will open and display:

- Care types you approved.
- Care types you did not approve.

Review the information carefully.

- If you need to update your decision, select **CANCEL**.
- Confirm that the delegation date is correct.
- For some care types, you can select the expand button to view additional details.

If you are satisfied with the decisions and the delegation date, select **SAVE DECISION**.

Save decision and delegate

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

You are about to save the delegate decision under the Aged Care Act 2024 for Bart Sampson.

The following care was agreed:

- Residential Permanent (High)
- ☒ Home Support Ongoing - SaH Classification 5
 - Home or community general respite:
 - Flexible respite: Recommended frequency is 3 days per week.
 - Domestic assistance:
 - General house cleaning: Recommended frequency is 1 time(s) per hour.
 - Laundry services: Recommended frequency is 1 days per month.
 - Home maintenance and repairs:
 - Gardening: Recommended frequency is 1 days per month.
 - Expenses for home maintenance and repairs: Recommended frequency is 2 days per week.
 - Meals:
 - Meal delivery: Recommended frequency is 1 days per month.
 - Meal preparation: Recommended frequency is 1 time(s) per day.
 - Transport:
 - Direct transport: Recommended frequency is 1 days per month.
 - Indirect transport
 - Care management: Home support care management
 - Personal care:
 - Assistance with self-care and activities of daily living: Recommended frequency is 1 days per week.
 - Assistance with self-administration of medications: Recommended frequency is 3 days per month.
 - Continence management (non-clinical): Recommended frequency is 2 days per month.
 - Nursing care:
 - Nursing assistant clinical care: Recommended frequency is 1 days per month.
 - Enrolled nurse clinical care: Recommended frequency is 2 days per week.
 - Nursing care consumables: Recommended frequency is 2 days per month.
 - Registered nurse clinical care: Recommended frequency is 2 days per week.
 - Social support and community engagement: Individual social support, Accompanied activities, Cultural support, Digital education and support, Assistance to maintain personal affairs, Expenses to maintain personal affairs
 - Allied health and therapy:
 - Social work: Recommended frequency is 2 time(s) per year.
 - Allied health assistance: Recommended frequency is 2 days per month.
 - Occupational therapy: Recommended frequency is 2 days per week.
- ☒ Assistive Technology Ongoing - Specified needs - Continence Products
- ☒ Home Modifications Short-term - HM Medium

Delegation date *
08/05/2025

SAVE DECISION CANCEL

! If you completed the approval process outside the system before recording it in the assessor portal, you can enter the earlier delegation date shown on the **Approval Form**.

You can download the Approval Form from the **Reports and Documents** tile in the assessor portal. The form provides evidence that you made the approval decision before entering it into the system.

Attach the completed Approval Form in the **Attachments** tab.

Save decision and delegate

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

You are about to save the delegate decision under the Aged Care Act 2024 for Bart Sampson.

The following care was agreed:

- Residential Permanent (High)
- ☒ Home Support Ongoing - SaH Classification 5
- ☒ Assistive Technology Ongoing - Specified needs - Continence Products
- ☒ Home Modifications Short-term - HM Medium

Delegation date *
07/05/2025

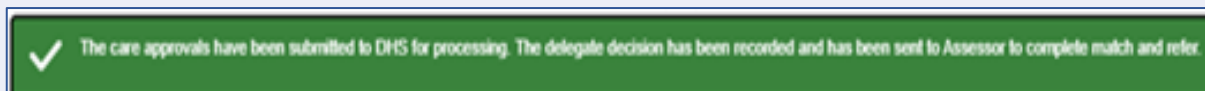
Delegation time
(e.g. hh:mm AM/PM) 12:15 PM

☒ I have made a decision for this client utilising other means before today

SAVE DECISION CANCEL

3. A confirmation message will appear to confirm that:

- The system has sent the approvals to Services Australia for processing.
- The system has recorded the delegate decision.
- The system has sent the decision to the Clinical Assessor to finalise the client's support plan and complete service matching and referrals.

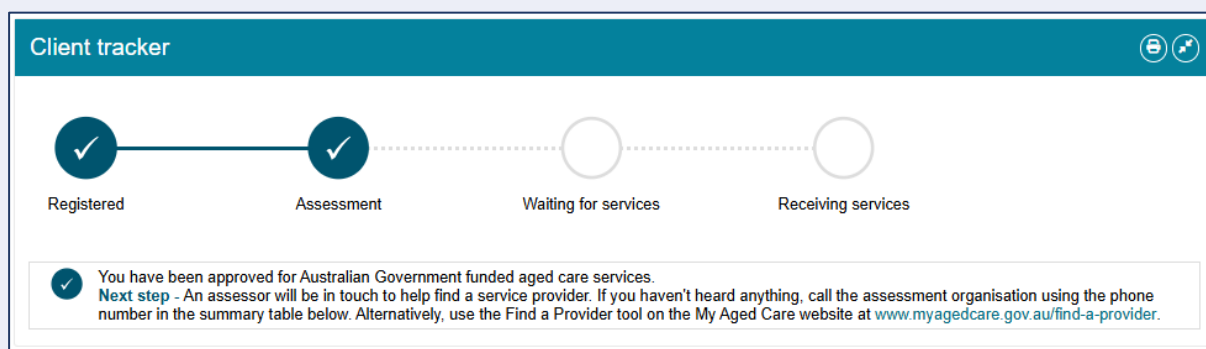


The **Client Journey Tracker** will then update to show one of the following messages:

- "You have been approved for Australian Government-funded aged care services", or
- "After careful consideration, you have not been approved to access Australian Government-funded aged care services".

The system will only display the approval message if you approve at least one service.

Client Journey Tracker showing client is approved for care



Non-Clinical Delegate workflow process

Non-clinical Assessment Delegates have the authority under the Act to approve entry-level services resulting from a Home Support Assessment.

They can approve access only to the Commonwealth Home Support Programme (CHSP), Assistive technology (AT), and Home modifications (HM) under CHSP. They cannot approve services under the AT-HM Scheme.

If the client requires any other type of approval, the assessor must convert the assessment to a Comprehensive Assessment. Once converted, the approval is sent to a Clinical Assessment Delegate for decision. A Clinical Assessment Delegate must approve all other service types and approvals, as outlined in the next section.

Agreeing with recommendations

To agree with the assessor's recommendations:

1. Select **AGREE** below the recommended service.

Mr William WILSON
Male, 76 years old, 1 January 1950, AC656666666
84 LEWIS LUXTON AVENUE GORDON, ACT, 2906

Primary contact: William Wilson (self) - 0412 123 123
No support relationships recorded

IAT Outcome and Classifications

Current assessment type: Home Support Assessment
IAT Outcome: CHSP
Recommended classification: CHSP Agreed CHANGE

Recommended care requiring delegate decision

Meals
Recommended that the client receive
• Meal delivery
• Meal preparation
● This recommendation is awaiting delegate decision
Priority: Low
AGREE DISAGREE

Transport
Recommended that the client receive
• Direct transport
● This recommendation is awaiting delegate decision
Priority: Low
AGREE DISAGREE

Expand Domestic assistance
Recommended that the client receive
Expand Domestic assistance instance
ADD A SERVICE RECOMMENDATION ADD NO CARE APPROVAL
RETURN TO ASSESSOR RETURN TO CLIENT

2. When the confirmation pop-up appears, select **AGREE** to confirm your decision.

×

Agree with recommendation

You are about to agree with the recommendation for William WILSON for Meals

- Meal delivery
- Meal preparation

AGREE

CANCEL

1. The system displays a confirmation message and updates the recommendation status to **Agreed**.

Recommended that the client receive
Meals

- Meal delivery
- Meal preparation

Priority

Low

●

Agreed

CHANGE

! Urgent services and Ongoing CHSP Referrals

All clients who receive urgent services must complete an assessment. If the assessment approves ongoing CHSP services, you must create new CHSP referrals for those services.

- CHSP providers can continue delivering urgent services until the assessment is complete.
- When ongoing CHSP services are approved, the urgent service referral should end.
- Create new CHSP referrals so the provider can continue delivering services on an ongoing basis.

If the delegate does not approve the urgent service:

- If the service has not started, the system recalls the direct-to-provider referral.
- If the service has already started, the system notifies the provider that the urgent service is not approved and that they must stop delivering the service.

Disagreeing with recommendations

If you disagree with a recommendation, the system will not approve that service.

If an assessor adds a recommendation in error, you can disagree with that recommendation and, if needed, add your own recommendation.


Recommended that the client receive
Domestic assistance



- General house cleaning
- Laundry services
- Shopping assistance

Priority Low
Delegate comment Not required.

☒ **Disagreed**

CHANGE

To disagree with a recommendation:

1. Select the **expand** button to view the recommended service.

Recommended care requiring delegate decision

 Recommended that the client receive Meals  	 Recommended that the client receive Transport  
 Recommended that the client receive Domestic assistance  	

2. Select **DISAGREE** below the recommended service. Repeat this step for each recommendation you want to disagree with.

Support plan and services PRINT COPY OF SUPPORT PLAN

Identified needs | Goals & recommendations | **Decisions** | Manage services & referrals | Associated People | Review

IAT Outcome and Classifications

Current assessment type: Home Support Assessment
 IAT Outcome: CHSP
 Recommended classification: CHSP  Agreed

Recommended care requiring delegate decision

 Recommended that the client receive Meals  	 Recommended that the client receive Transport   • Direct transport This recommendation is awaiting delegate decision Priority Low AGREE DISAGREE
 Recommended that the client receive Domestic assistance  	

3. Enter a comment explaining why you disagree with the recommendation, then select **DISAGREE**.

Disagree with recommendation ×

You are about to disagree with the recommendation for William WILSON for
 Transport

- Direct transport

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

Comments or reason for disagreement *

Recommendation was incorrectly applied by assessor.

The system displays a confirmation message and updates the recommendation status to **Disagreed**.

Recommended care requiring delegate decision

Recommended that the client receive
Meals

Recommended that the client receive
Domestic assistance

Recommended that the client receive
Transport

- Direct transport

Priority

Low

Delegate comment

Recommendation was incorrectly applied by assessor.

Disagreed

CHANGE

ADD A SERVICE RECOMMENDATION

ADD NO CARE APPROVAL

SAVE AND DELEGATE

RETURN TO ASSESSOR

RETURN TO CLIENT

✓ Recommendation successfully updated.

↑

4. If you need to change your decision before completing the approval process, select **CHANGE**.
 - This option is available only until you save and complete the approval process by selecting **Save and Delegate**.
 - For more information, refer to [Changing a Decision](#).

Change decision

You are about to change the recommendation from agreed to **disagreed** for William WILSON for Transport

- Direct transport

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

Comments or reason for disagreement *
Maximum 255 characters

CHANGE

CANCEL

Editing a recommendation

To edit a service recommended by an assessor:

1. Select the **Edit** icon next to the recommendation.

Recommended care requiring delegate decision


Recommended that the client receive
Meals

- Meal delivery
- Meal preparation

Priority Low

 **Agreed**

CHANGE




2. In the **Edit Care Type** pop-up, make the required changes.
Select **SAVE TO PLAN** to save your changes.

Edit service recommendation

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

Service Type: *
Meals

☒ Meal delivery ☒ Meal preparation

Priority and dates

Priority *
Low

Recommended service frequency ? Recommended service intensity ?

Recommend a start date
☐ Yes ☒ No

Recommend a review date
☐ Yes ☒ No

Recommend an end date
☐ Yes ☒ No

Responsibility to action
☐ Assessor ☐ Client ☐ Other

Comments:
0 / 100

SAVE TO PLAN CANCEL

Changing a decision

To change your decision for a service:

1. Select **CHANGE** to update your decision from **Agreed** to **Disagreed**, or from **Disagreed** to **Agreed**.

IAT Outcome and Classifications

Current assessment type: Home Support Assessment
IAT Outcome: CHSP
Recommended classification: CHSP ☒ Agreed **CHANGE**

Recommended care requiring delegate decision

Recommended that the client receive
Meals

Recommended that the client receive
Domestic assistance

Recommended that the client receive
Transport

- Direct transport

Priority Low
Delegate comment Recommendation was incorrectly applied by assessor.

Disagreed
CHANGE

ADD A SERVICE RECOMMENDATION ADD NO CARE APPROVAL

SAVE AND DELEGATE RETURN TO ASSESSOR RETURN TO CLIENT

2. In the pop-up window, add an approval cease date and comments if required.

Change decision

You are about to change the recommendation from agreed to **disagreed** for William WILSON for Transport

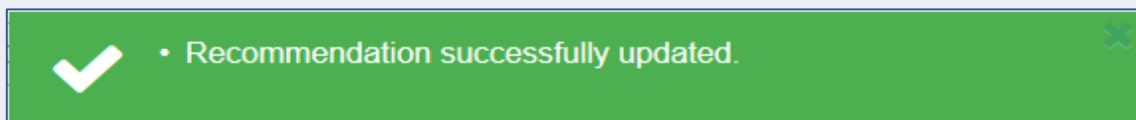
- Direct transport

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

Comments or reason for disagreement *
 ⓘ Maximum 255 characters

CHANGE CANCEL

3. If you change the decision from **Agreed** to **Disagreed**, enter a reason for the change. You can only change a decision before you complete the approval process by selecting **Save and Delegate**.
4. The system displays a confirmation message.



Adding CHSP services

Non-Clinical Assessment Delegates can add service recommendations for a client when required.

1. Select **ADD A SERVICE RECOMMENDATION**.

First Name Last Name
Male, 76 years old, DD Month Year, ACXXXXXXX1
84 Test Avenue, Test Suburb, ACT, 2906

Primary contact: First Name Last Name 0404 0404 0404
No support relationships recorded

Support plan and services

Identified needs | Goals & recommendations | **Decisions** | Manage services & referrals | Associated People | Review

IAT Outcome and Classifications

Current assessment type: Home Support Assessment
IAT Outcome: CHSP
Recommended classification: CHSP Agreed [CHANGE](#)

Recommended care requiring delegate decision

☒ Recommended that the client receive **Meals**

☒ Recommended that the client receive **Transport**

☒ Recommended that the client receive **Domestic assistance**

[ADD A SERVICE RECOMMENDATION](#) [ADD NO CARE APPROVAL](#)

[SAVE AND DELEGATE](#) [RETURN TO ASSESSOR](#) [RETURN TO CLIENT](#)

2. In the pop-up window, select the appropriate service from the drop-down list.

Add service recommendation

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

Service Type: *
Transport

☐ Direct transport ☐ Indirect transport

Priority and dates

Priority: *
Low

Recommended service frequency ? Recommended service intensity ?

Recommend a start date
☐ Yes ☒ No

Recommend a review date
☐ Yes ☒ No

Recommend an end date
☐ Yes ☒ No

Responsibility to action
☐ Assessor ☐ Client ☐ Other

Comments:

[SAVE TO PLAN](#) [CANCEL](#)

The system adds the service to the Support Plan and sets the decision to **Agreed** by default.

Recommended that the client receive

Transport

- Direct transport

Priority Low

Agreed

CHANGE

Finalising your decision

To complete the approval process:

1. After making your decision, select **SAVE AND DELEGATE**.

Support plan and services

Identified needs Goals & recommendations **Decisions** Manage services & referrals Associated People Review

PRINT COPY OF SUPPORT PLAN

IAT Outcome and Classifications

Current assessment type: Home Support Assessment
IAT Outcome: CHSP
Recommended classification: CHSP **Agreed** CHANGE

Recommended care requiring delegate decision

- Recommended that the client receive Meals
- Recommended that the client receive Domestic assistance
- Recommended that the client receive Transport

ADD A SERVICE RECOMMENDATION ADD NO CARE APPROVAL

SAVE AND DELEGATE RETURN TO ASSESSOR RETURN TO CLIENT

2. Review the confirmation pop-up, which shows the services you agreed to and the services you did not agree to.

If you need to update your decision, select **CANCEL** and make the required changes.

Check that the delegation date is correct.

For some service types, select the **expand** button to view additional information.

If you are satisfied with the decision and the delegation date, select **SAVE DECISION**.

Save decision and delegate

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

You are about to save the delegate decision under the *Aged Care Act 2024* for William Wilson.

The following care was **agreed**:

- Meals
 - Meal delivery, Meal preparation
- Transport
 - Direct transport

The following care was **not agreed**:

- Domestic assistance
 - Shopping assistance, General house cleaning, Laundry services

Delegation date *
10/06/2026

SAVE DECISION

CANCEL

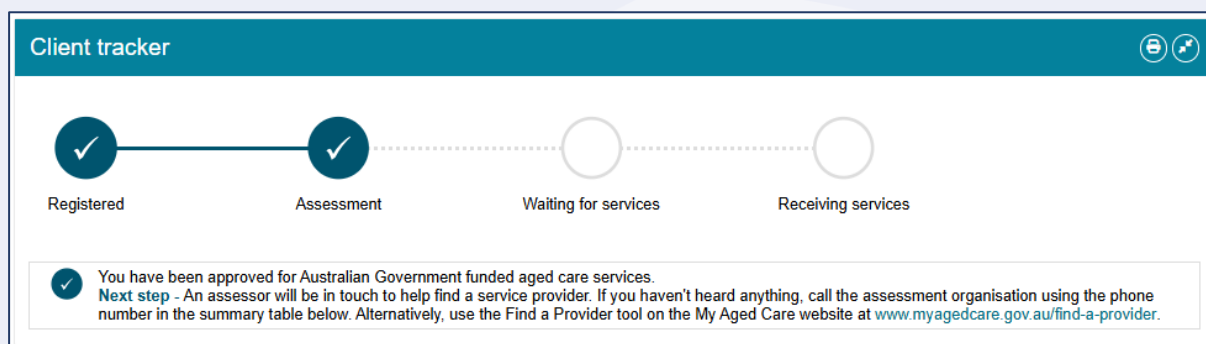
3. After you save the decision, the Client Journey Tracker updates with one of the following messages:

‘You have been approved for Australian Government-funded aged care services.’ or

‘After careful consideration, you have not been approved to access Australian Government-funded aged care services.’

The client will only receive the approval message if you approve at least one service.

Client Journey Tracker showing client is approved for care



! If you completed the approval outside the system before recording it in the portal, you can enter the earlier delegation date shown on the Approval Form.

You can download the Approval Form from the **Reports and Documents** tile in the Assessor Portal. The form provides evidence that you made the approval decision before recording it in the system.

Attach the Approval Form to the **Attachments** tab.

4. Correspondence Notifications

If you approve a Support at Home classification or a Residential Care classification, you can choose to receive notifications about correspondence the department sends to the client.

For Support at Home, you may want to receive notifications if the client is vulnerable and may need support from a clinical assessor to connect with Home Support services.

Examples of Residential Care correspondence include:

- Allocation of a permanent residential care place.
- A notification that an approval is about to expire.

For more information about notifications and tasks in the assessor portal, refer to [My Aged Care – Assessor Portal User Guide 9 – Tasks and notifications](#).

To set up correspondence notifications:

5. Open the client's record and go to the **Approvals** tab.

In the **Correspondence** section, select the **expand** button.

You can nominate one person from the outlet to receive Support at Home correspondence notifications.

Approvals

REFER THIS CLIENT FOR ASSESSMENT | VIEW CLIENT REPORT | CONTINUE SUPPORT PLAN REVIEW

Client summary | Client details | Support network | **Approvals** | Plans | Attachments | Services | My Aged Care interactions | Notes

Tasks and Notifications | Residential Funding Classifications

This page shows you what care approvals are in place

Current care approvals

Home support Ongoing - SaH Classification 2

✓ Delegate decision completed and submitted to SvA.

Priority category: Standard
 Approval starts: 19 December 2025
 Status: Funding pending
 Source System: Gateway
 Home support services: Seeking services

Seeking services

All dates and times are in Australian Eastern Time (AEST)
 The client's preference/s for seeking services through the Support at Home program are:

Home support Ongoing - client is Seeking services [CHANGE](#)
 Last update: 11/03/2026 8:33:54 AM by Africa Green (Assessor)

DHS prior approvals last updated

Never

Correspondence

Notify of Support at Home correspondence ?
 No-one selected

6. A pop-up window appears. Select **Notify of Home Care/Support at Home Correspondence**. Select a recipient from the drop-down list, then select **SAVE**.

Notify of SaH correspondence

i No-one is currently selected to receive notifications when Sigiward Tomova is sent SaH correspondence.

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

☐ Do not notify anyone
☒ Notify of home care/SaH correspondence

Recipient *

SAVE **CANCEL**

7. Your nominated recipient appears in the **Correspondence** section of the client's **Approvals** tab.

 **Approvals**

REFER THIS CLIENT FOR ASSESSMENTVIEW CLIENT REPORTCONTINUE SUPPORT PLAN REVIEW

Client summaryClient detailsSupport network**Approvals**PlansAttachmentsServicesMy Aged Care interactionsNotes

Tasks and NotificationsResidential Funding Classifications

This page shows you what care approvals are in place

Current care approvals

 Home support Ongoing - SaH Classification 2

DHS prior approvals last updated

Never

Correspondence

Notify of Support at Home correspondence ?

Zula Meek 

Seeking services

All dates and times are in Australian Eastern Time (AEST)

The client's preference/s for seeking services through the Support at Home program are:

Home support Ongoing - client is Seeking services [CHANGE](#)

Last update: 11/03/2026 8:33:54 AM by Africa Green (Assessor)

Notice of Decision (approval or non-approval) letter and SaH Restorative Care Pathway (Second Unit) approval and non-approval letter

After completing the delegate decision, you can generate and upload a **Notice of Decision (NoD)** letter or a **Support at Home (SaH) Restorative Care Pathway (second unit)** approval letter. You can do this for both approval and non-approval decisions.

To generate, print, and upload a letter:

1. Open the client's Support Plan and go to the **Decisions** tab.
2. Select the appropriate letter option for the client's circumstances.

The buttons on the Decisions tab and the options in the pop-up window will vary depending on the available letter types.

3. Generate, print, and upload the required letter.

You can also upload Notice of Decision letters from the **Attachments** tab.

If you agree to more than one care type recommendation for a client, you only need to generate, upload, and print one approval letter. The letter will include all approved care types.

A person with the Delegate Support role can also generate, print, and upload these letters.

Approval Letters

! For approval decisions, include the following information in the Notice of Decision:

- The approved service groups, and where relevant, the approved service types and services.
- The approved classification type for each service group.
- the approved classification levels for each service group.
- The approved priority category, where applicable.
- The reasons for the decision and the evidence that supports it.
- Information about the older person's review rights if they want to question or challenge the decision.

Including this information helps ensure clients receive clear, consistent, and high-quality decision letters.

To generate, upload, and save an approval letter:

1. Open the client's profile and select the **Plans** tab. On the **Plans** page, select **Support Plan**.

Plans

REFER THIS CLIENT FOR ASSESSMENT VIEW CLIENT REPORT CONTINUE SUPPORT PLAN REVIEW

Client summary Client details Support network Approvals **Plans** Attachments Services My Aged Care interactions Notes Tasks and Notifications

Residential Funding Classifications

Current Episode
Episode ID: 2-21UJRN04
9 July 2025 - Present
SUPPORT PLAN

Assessment history

- Comprehensive Assessment 9 July 2025
- Screening 9 July 2025

2. On the **Support Plan and Services** page, select the **Decisions** tab. At the bottom of the page, select **GENERATE APPROVAL LETTER**.

Support plan and services

REQUEST ASSESSMENT PRINT COPY OF SUPPORT PLAN

Identified needs Goals and recommendations **Decisions** Manage services & referrals Associated People Review

IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment Existing classification: SaH Classification 4 (Pending allocation)
IAT Outcome: SaH Classification 4 AT High (Pending allocation)

Delegate decisions and comments

Support Plan Review: Submitted on 2 February 2026

Decisions

Recommend that the client receive Assistive technology

Decision date (Support Plan Review)
2 February 2026 04:42 PM (Australian Eastern Standard Time)

Assessment: Submitted on 2 February 2026

Decisions

Recommend that the client receive Home support

Recommend that the client receive Assistive technology

Decision date (Assessment)
2 February 2026 11:53 AM (Australian Eastern Standard Time)

GENERATE APPROVAL LETTER UPLOAD APPROVAL LETTER

RETURN TO CLIENT

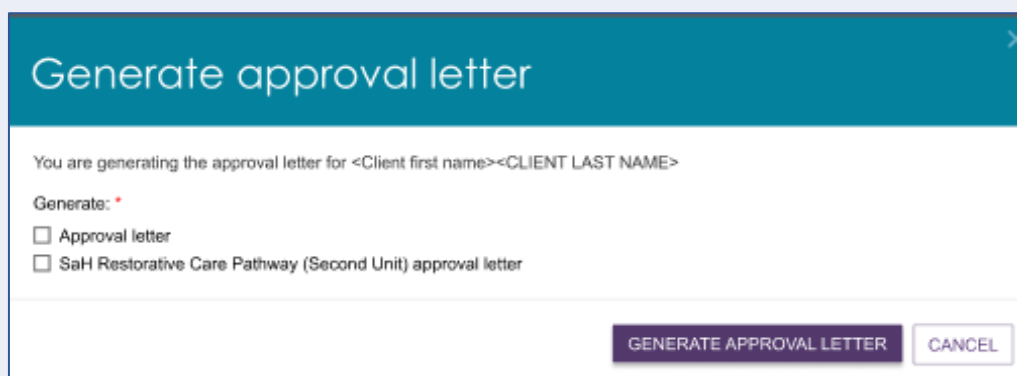
3. In the **Generate Approval Letter** pop-up, confirm that you have selected the correct client, then select **GENERATE APPROVAL LETTER**.

Generate approval letter

You are generating the approval letter for Stacey SMITH

GENERATE APPROVAL LETTER CANCEL

You can generate a **Notice of Decision (NoD)** approval or non-approval letter, or a **Support at Home Restorative Care Pathway (Second Unit)** approval letter using the same process.



Generate approval letter

You are generating the approval letter for <Client first name><CLIENT LAST NAME>

Generate: *

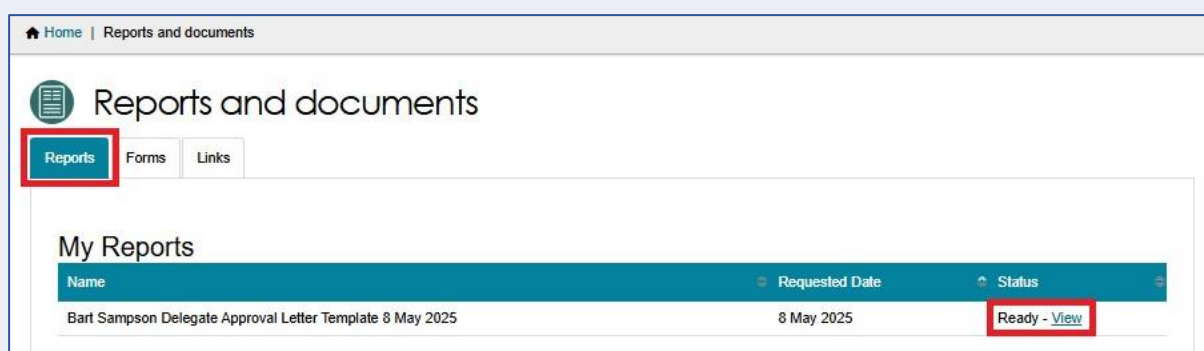
☐ Approval letter

☐ SaH Restorative Care Pathway (Second Unit) approval letter

GENERATE APPROVAL LETTER CANCEL

4. If the letter takes longer than expected to generate, the system redirects you to the **Reports** tab. Select **View** to open the letter.

The system keeps NoD letters and Referral Code letters in **Recently Requested Reports** for seven days. After that, you can generate them again using the same process.



Home | Reports and documents

Reports and documents

Reports Forms Links

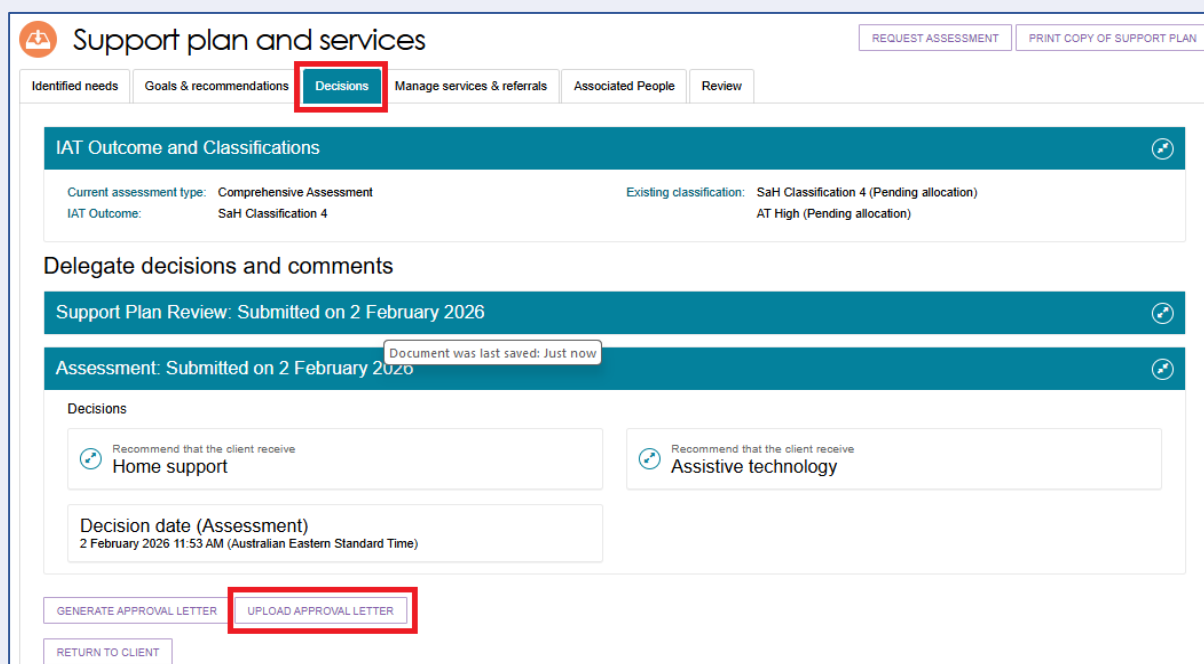
My Reports

Name	Requested Date	Status
Bart Sampson Delegate Approval Letter Template 8 May 2025	8 May 2025	Ready - View

5. After signing the letter, return to the **Decisions** tab and select **UPLOAD APPROVAL LETTER** to upload it to the client's record.

You can also upload the letter from the **Attachments** tab.

Decisions Tab



Support plan and services

REQUEST ASSESSMENT PRINT COPY OF SUPPORT PLAN

Identified needs Goals and recommendations **Decisions** Manage services & referrals Associated People Review

IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment Existing classification: SaH Classification 4 (Pending allocation)
IAT Outcome: SaH Classification 4 AT High (Pending allocation)

Delegate decisions and comments

Support Plan Review: Submitted on 2 February 2026

Assessment: Submitted on 2 February 2026

Decisions

Recommend that the client receive Home support

Recommend that the client receive Assistive technology

Decision date (Assessment)
2 February 2026 11:53 AM (Australian Eastern Standard Time)

GENERATE APPROVAL LETTER **UPLOAD APPROVAL LETTER** RETURN TO CLIENT

Attachments Tab

Morgan FREEMAN
Male, 88 years old, 1 June 1937, AC36914539
56 WHITE TRAIL ROAD BREMER BAY, WA, 6338

Primary contact: Morgan Freeman (self)
No support relationships recorded

Attachments REFER THIS CLIENT FOR ASSESSMENT VIEW CLIENT REPORT

Client summary | Client details | Support network | Approvals | Plans | **Attachments** | Services | My Aged Care interactions | Notes | Tasks and Notifications

Residential Funding Classifications

Attachments

ADD AN ATTACHMENT

Assessment Attachments | Other Attachments | Correspondence

No attachments found to be displayed.

In the **Upload Approval Letter** or **Add Attachment** pop-up:

- Select the approval letter file to upload.
- Approval letters must be uploaded in **PDF format**. PDF format ensures the document cannot be changed after finalisation.
- The system generates NoD letters in Rich Text Format (.rtf) by default, but you cannot upload this format.
- Do not upload Word documents as formal approval letters.
- Enter an attachment name.
- If you are uploading the letter, select **Approval letter sent to client** as the attachment type.
- Optionally, add a short description.
- Select **UPLOAD**.

UPLOAD APPROVAL LETTER EXAMPLE

Upload approval letter

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

You can upload files up to 5MB. The following file types are accepted: .jpeg, .jpg, .bmp, .png, .docx, .xlsx, .pdf, .txt

Approval letter to upload *

CHOOSE FILE Morgan Fr... 2026.pdf

Name of the attachment: *

Morgan Freeman Approval Letter

Please provide a short description about the contents of the attachment, e.g. assessment date and time

Details go here

UPLOAD **CANCEL**

ADD AN ATTACHMENT EXAMPLE

Add an attachment

Please note: Some attachments will be viewable by other people with authorised access to this client record. Please refer to your portal guide for details.

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

You can upload files up to 5 MB to this record. The following file types are accepted: .jpeg, .jpg, .bmp, .png, .docx, .xlsx, .pdf, .txt *

Morgan Fr... 2026.pdf

Name of the attachment: *
Morgan Freeman Approval Letter

Type of attachment *
Approval Letter Sent to Client

Please provide a short description about the contents of the attachment, e.g. assessment date and time

Description about approval letter

6. The uploaded letter appears in the **Attachments** tab.

Morgan FREEMAN
Male, 88 years old, 1 June 1937, AC36914539
56 WHITE TRAIL ROAD BREMER BAY, WA, 6338

Primary contact: Morgan Freeman (self)
No support relationships recorded

Attachments

REFER THIS CLIENT FOR ASSESSMENT
VIEW CLIENT REPORT

Client summary | Client details | Support network | Approvals | Plans | **Attachments** | Services | My Aged Care interactions | Notes | Tasks and Notifications

Residential Funding Classifications

Attachments

Assessment Attachments | Other Attachments | Correspondence

Approval Letter Sent to Client
Morgan Freeman Approval Letter_260202191401 [pdf 300.71KB]

2 February 2026

Non-approval Letters

Delegates can only generate a non-approval letter when the decision includes **No Care Approval** or **No Change to Existing Care Approvals**.

To generate, upload, and save a non-approval letter:

1. Open the client's profile and select the **Plans** tab. On the **Plans** page, select **Support Plan**.

Plans

REFER THIS CLIENT FOR ASSESSMENT
VIEW CLIENT REPORT
CONTINUE SUPPORT PLAN REVIEW

Client summary | Client details | Support network | Approvals | **Plans** | Attachments | Services | My Aged Care interactions | Notes | Tasks and Notifications

Residential Funding Classifications

Current Episode

Episode ID: 2-21UJRN04
9 July 2025 - Present

Assessment history

- Comprehensive Assessment 9 July 2025
- Screening 9 July 2025

- Go to the **Decisions** tab of the support plan and select **GENERATE NON-APPROVAL LETTER** at the bottom of the page.

Support plan and services PRINT COPY OF SUPPORT PLAN

Identified needs | Goals & recommendations | **Decisions** | Manage services & referrals | Associated People | Review

IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment
IAT Outcome: SaH Classification 3

Delegate decisions and comments

Assessment: Submitted on 2 February 2026

Decisions

No Care Approval
Priority for this care type: Low ?
Approval starts: 2 February 2026
● Agreed

Recommend that the client receive
Home support

Decision date (Assessment)
2 February 2026 12:00 AM (Australian Eastern Standard Time)

GENERATE NON-APPROVAL LETTER | **UPLOAD NON-APPROVAL LETTER**

REQUEST/CHANGE NOTIFICATION OF SAH CORRESPONDENCE | RETURN TO CLIENT

If the letter takes longer than expected to generate, the system redirects you to the **Reports** tab. Select **View** to open the letter.

The system keeps user-generated documents, including Notice of Decision (NoD) letters and Referral Code letters, in **Recently Requested Reports** for seven days. After that, you can generate them again using the same process.

If you do not approve a second concurrent unit of Restorative Care Pathway (RCP) funding, use the offline template **Letter Template – Second Concurrent Unit of RCP Funding** (or a similarly titled template). You can find this template in **Reports and Documents** under the **Forms** tab.

Reports and documents

Reports | Forms | Links

My Reports

Name	Requested Date	Status
Al Capone Delegate Non-Approval Letter Template 2 February 2026	2 February 2026	Ready - View

- After signing the letter, return to the **Decisions** tab and select **UPLOAD NON-APPROVAL LETTER** to upload it to the client's record.

You can also upload the letter from the **Attachments** tab.

Decisions tab of the Support Plan

Support plan and services PRINT COPY OF SUPPORT PLAN

Identified needs | Goals & recommendations | **Decisions** | Manage services & referrals | Associated People | Review

IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment
IAT Outcome: SaH Classification 3

Delegate decisions and comments

Assessment: Submitted on 2 February 2026

Decisions

No Care Approval
Priority for this care type: Low
Approval starts: 2 February 2026
Agreed

Recommend that the client receive
Home support

Decision date (Assessment)
2 February 2026 12:00 AM (Australian Eastern Standard Time)

GENERATE NON-APPROVAL LETTER **UPLOAD NON-APPROVAL LETTER**
REQUEST/CHANGE NOTIFICATION OF SAH CORRESPONDENCE RETURN TO CLIENT

Attachments Tab of the Client Record

First Name Last Name
Male, 79 years old, :DD Month Year, ACXXXXXXX1
Test Test AVENUE, TEST SUBURB, OULBURN, NSW, 2580

Primary contact: First Name Last Name
No support relationships recorded

Attachments REFER THIS CLIENT FOR ASSESSMENT VIEW CLIENT REPORT

Client summary | Client details | Support network | Approvals | Plans | **Attachments** | Services | My Aged Care interactions | Notes | Tasks and Notifications

Residential Funding Classifications

Attachments

ADD AN ATTACHMENT

Assessment Attachments | Other Attachments | Correspondence

No attachments found to be displayed.

4. In the **Upload Non-Approval Letter** or **Add Attachment** pop-up:

- Select the non-approval letter file.
- Upload the letter in **PDF** format only. PDF format ensures the document cannot be changed after finalisation.
- The system generates NoD letters in **Rich Text Format (.rtf)** by default, but you cannot upload this format.
- Do not upload Word documents as formal non-approval letters.
- Enter an attachment name.
- Select **Non-approval letter sent to client** as the attachment type.
- Optionally, enter a short description of the attachment.
- Select **UPLOAD**.

Upload Non-approval letter pop up example

Upload non-approval letter

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

You can upload files up to 5MB. The following file types are accepted: .jpeg, .jpg, .bmp, .png, .docx, .xlsx, .pdf, .txt

Non-Approval letter to upload *

CHOOSE FILE AI Capon...ry 2026.pdf

Name of the attachment: *

AI Capone Non-approval letter

Please provide a short description about the contents of the attachment, e.g. assessment date and time

Details go here

UPLOAD CANCEL

Add an attachment example

Add an attachment

Please note: Some attachments will be viewable by other people with authorised access to this client record. Please refer to your portal guide for details.

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

You can upload files up to 5 MB to this record. The following file types are accepted: .jpeg, .jpg, .bmp, .png, .docx, .xlsx, .pdf, .txt *

CHOOSE FILE AI Capon...ry 2026.pdf

Name of the attachment: *

AI Capone Non-approval letter

Type of attachment *

Non-Approval Letter to Client

Please provide a short description about the contents of the attachment, e.g. assessment date and time

Details go here

UPLOAD CANCEL

- The uploaded non-approval letter appears in the **Attachments** tab.

First Name Last Name
Male, 79 years old, DD Month Year, ACXXXXXXXXX1
Test Test AVENUE, TEST SUBURB GOULBURN, NSW, 2580

Primary contact: First Name Last Name
No support relationships recorded

Attachments

Client summary Client details Support network Approvals Plans **Attachments** Services My Aged Care interactions Notes Tasks and Notifications

Residential Funding Classifications

Attachments

ADD AN ATTACHMENT

Assessment Attachments Other Attachments Correspondence

Non-Approval Letter to Client 2 February 2026
Al Capone Non-approval letter_260202215603 [pdf 292.12KB] HIDE FROM VIEW
Details go here

Managing services and referrals

Complete the Notice of Decision for a Home Support Assessment before you manage services or issue referrals. For more information about managing referrals, refer to [Assessor Portal User Guide 8 - Referring for Services](#).

Requesting correction to care approval decision

You can request a correction if you make an error when recording a decision.

You can submit a correction request up to 42 days after the original delegation date, provided there are no active or commenced service referrals.

To request a correction to a care approval decision:

In the **Delegate Decisions** area of the portal, open the **Decision History** tab.

1. Select the **expand** arrow on the client card to view a summary of the client's information.

If you are using **List View**, expand the client information to access the same options.

2. Select **REQUEST CHANGES TO CARE APPROVAL DECISION**.

1. Card View

First Name LAST NAME

Age 88 (DD Month Year) Referred from Assessment organisation on DD Month Year

Recommended care:

Home Support Short-term - SaH Restorative Care Pathway

Assistive Technology Short-term - AT Low

VIEW SUPPORT PLAN VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

REQUEST CHANGES TO CARE APPROVAL DECISIONS

List View

Last name	First name	Aged care user ID	Assessor full name	Delegato full name	Assessment status	Date submitted	Priority
LAST NAME	First Name	ACXXXXXXXX1	LAST NAME First Name	LAST NAME First Name	Delegate Decision Complete	DD/MM/YYYY	High
LAST NAME	First Name	ACXXXXXXXX2	LAST NAME First Name	LAST NAME First Name	Finalised	DD/MM/YYYY	Medium
LAST NAME	First Name	ACXXXXXXXX3	LAST NAME First Name	LAST NAME First Name	Delegate Decision Complete	DD/MM/YYYY	Low

Age 88 (1 July 1936) Referred from Assessment organisation on DD Month Year

Recommended care:

- Home Support Short-term - SaH Restorative Care Pathway
- Assistive Technology Short-term - AT Low

VIEW SUPPORT PLAN VIEW FULL CLIENT RECORD VIEW CLIENT REPORT **REQUEST CHANGES TO CARE APPROVAL DECISIONS**

- Enter the reason for the change and provide supporting information. Ensure your reason aligns with the assessment information recorded for the client.

Select **OK, START CHANGES**.

Request changes to care approval decisions

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

You are about to request changes to the care approval decisions for Gerry Gardener.

Please provide a comment for these changes? *

0 / 255

OK, START CHANGES CANCEL

- The system redirects you to the client's **Support Plan and Services** page and displays a confirmation message that the correction request is in progress.

You have successfully requested to begin making corrections to Care Approvals.

Care approval correction in progress.

- Update the care approval decision as required. You can
 - Add or remove care types.
 - [make changes to the commencement date of the delegate decision](#)
 - [request a correction to remove and add care classifications within a care type.](#)
- To view previous corrections, open the **Decision History** tab and select **VIEW CORRECTIONS HISTORY**.

Making changes to the Decision Date of the delegate decision

Delegates can change the Decision Date (commencement date) of a delegate decision.

This option is available for Comprehensive Assessments and Home Support Assessments, and for all three decision stages: Assessment, Support Period, and Support Plan Review. However, you cannot change decisions for Permanent Residential Care, Residential Respite Care, or Transition Care during the Support Period or Support Plan Review stages.

If a client has multiple decision dates on their record, you can only change the most recent decision date.

To change the Decision Date:

1. Before changing the decision date, complete the required declarations and attach the Offline Approval Form.
2. Go to **Delegate Decisions and Comments**, open the relevant client record, and select the **Edit** (pencil) icon next to the **Decision Date** field.

3. In the **Edit Delegation Date** pop-up window, enter the required information.
 - Use the **date picker** to select the delegation date.
 - Use the **time picker** to select the delegation time.
 - Select **SAVE TO PLAN**.

4. The system displays **green** and **blue** banners confirming that it has saved the change and showing its status.

5. Select **SUBMIT FOR AGED CARE ASSESSMENT (ACAP) PROGRAM**.

Requesting a Correction to Remove and Add Care Classifications within a care type

1. To remove a care classification or service approval that was added in error, select the **Remove** (bin) icon next to the decision.

Identified needs | Goals & recommendations | **Decisions** | Manage services & referrals | Associated People | Review

IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment
IAT Outcome: SaH Classification 5

Delegate decisions and comments

Assessment: Submitted on 15 July 2025

Requested Changes

Requested date: 4 September 2025

Residential Respite Care	
Priority for this care type	High ?
Approval starts	23 July 2025
Declaration	Yes
Reason DEMMI not completed	fhgh
Source system	Gateway

2. In the confirmation pop-up, select **REMOVE RECOMMENDATION**.

Remove Residential Respite Care

Do you want to remove this recommendation?

REMOVE RECOMMENDATION CANCEL

3. The system displays a green banner to confirm that it has removed the care approval.

Requested Changes

Requested date: 4 September 2025

Residential Respite Care

Residential Respite Care has been removed as part of this Care Approval Correction

✓ You have successfully removed a Care Approval.

i Care approval correction in progress.

Decision date (Assessment)

✓ Service successfully removed.

4. To add the correct program or service approval, select **ADD A CARE TYPE FOR**

DELEGATE DECISION.

Residential Respite Care
Residential Respite Care has been removed as part of this Care Approval Correction

Decision date (Assessment)
4 September 2025 12:00 AM (Australian Eastern Standard Time)

ADD A CARE TYPE FOR DELEGATE DECISION

SUBMIT FOR AGED CARE ASSESSMENT PROGRAM (ACAP) DECISION **RETURN TO CLIENT**

i Care approval correction in progress.

5. In the pop-up window, enter the correct care type, service level, and priority for the Clinical Assessment Delegate decision.
 - Complete all required fields marked with a red asterisk (*).
 - Select **SAVE TO PLAN**.

6. After you save the changes, the system displays a blue banner to confirm that the care approval correction is in progress.

7. If you leave the correction screen before submitting the correction request, return to the **Decision History** tab in **Delegate Decisions** and select the client record.

The client record will display an **Update Pending** status.

Then, select **CONTINUE MAKING CHANGES TO CARE APPROVAL DECISIONS** from the expanded client card on the **Decision History** page.

First Name LAST NAME

Assessor: GREEN Africa
Delegate: GREEN Africa
Aged care user ID: AC54062120

First Name LAST NAME

Assessor: GREEN Africa
Delegate: GREEN Africa
Aged care user ID: AC47443163

First Name LAST NAME

Age 80 (12 June 1945), Identifies as: Aboriginal
Referred from GRAZIER AGED CARE - ACA - ACT on 24 July 2025

Recommended care:

- Residential Respite Care

Home support Ongoing - SaH Classification 5

CONTINUE MAKING CHANGES TO CARE APPROVAL DECISIONS VIEW SUPPORT PLAN VIEW FULL CLIENT RECORD

VIEW CLIENT REPORT

- Review the requested changes and make any required updates to the care approval decisions. When you have finished, select **SUBMIT FOR AGED CARE ASSESSMENT PROGRAM (ACAP) DECISION**.

Requested Changes
Requested date: 4 September 2025

Residential Respite Care
Residential Respite Care has been removed as part of this Care Approval Correction

Decision date (Assessment)
4 September 2025 12:00 AM (Australian Eastern Standard Time)

ADD A CARE TYPE FOR DELEGATE DECISION

SUBMIT FOR AGED CARE ASSESSMENT PROGRAM (ACAP) DECISION RETURN TO CLIENT

Care approval correction in progress.

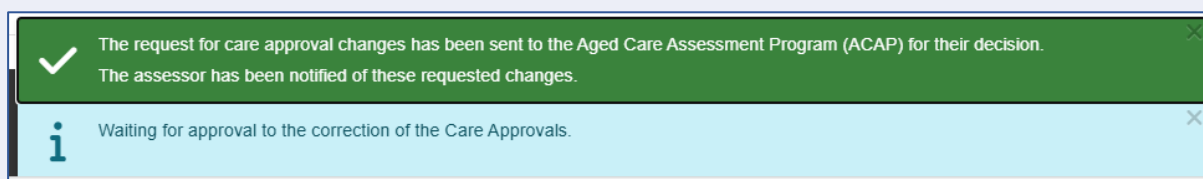
A confirmation pop-up will appear. Select **SUBMIT** to continue.

Submit for Aged Care Assessment Program (ACAP) decision

You are about to submit the changes to the care approvals to the Aged Care Assessment Program (ACAP) for their decision.

SUBMIT CANCEL

9. The system displays a confirmation message advising that the Department's **Aged Care Assessment Program (ACAP)** delegate has received the correction request.



10. The client record appears in the **Decision History** tab with an **Acceptance Pending** status.

11. Once the ACAP delegate reviews and finalises the correction request (outside of the Assessor Portal), the system updates the status accordingly.

12. You will also receive a notification on the **Tasks and Notifications** page.
- You can search for notifications using the client's last name, first name, Aged Care User ID, or the **Advanced Search** options.
 - The notification includes links to the client record and the correction request.
 - You can also remove the notification from the page.

Tasks and notifications

Tasks Notifications HCP Notifications Maximum wait times

Filter by

Last name First name Aged Care user ID

ADVANCED SEARCH CLEAR FILTERS

Date received is after 25 November 2024 and Outlet name is GRAZIER AGED CARE - ACA - ACT

FILTER CLEAR

☐ Select all

Received	Category	Title/Description	Channel	Aged Care User ID	Client name
26 May 2025	Delegate Decision	Correction of Care Approval A request for correction to care approvals has been submitted. Details are as follows - Aged Care User Id: AC16332744 Correction Details: Remove Home Care Package Level 2Add Home Care Package Level 3 Activity Id: 2-160144606399 Go to: Decisions		AC16332744	YINDI Thomas

13. After the Clinical Assessment Delegate completes the correction decision, you will receive another notification confirming that the correction is complete.
14. The assessment status in the **Decision History** tab will update to **ACAP Decision Complete**. Select the **expand** arrow to view additional details, including the correction date and the outcome of the correction request.

Last name	First name	Aged care user ID	Assessor full name	Delegate full name	Assessment status	Date submitted	Priority
Donnelly	Ian	AC1111111111	HAMILTON Halle	HAMILTON Halle	ACAP Decision Complete	20/07/2017	Medium

Age 85 (1 July 1932)

Decision on changes to care approvals on 20 July 2017

Transmission status to DHS: ● FAILED

Recommended care
Residential Respite Low Care
Residential Permanent
Home Care Package Level 4

VIEW SUPPORT PLAN VIEW CLIENT RECORD VIEW PDF OF CLIENT RECORD REQUEST CHANGES TO CARE APPROVAL DECISIONS

VIEW CORRECTIONS HISTORY

15. To view the client's full correction history, select **VIEW CORRECTIONS HISTORY**.

View corrections history

Decision history for Ian Donnelly

Home Care Package Level 4 (Update Accepted) 20 July 2017

CLOSE

Requesting and Approving Care Extensions

Care extensions can be requested by clinical assessors or service providers.

For **Residential Respite Care** and **Transition Care** approvals, service providers can request a care extension on the client's behalf through the My Aged Care Services and Support Portal.

For **Residential Respite Care**, clinical assessors can also request a care extension through the Assessor Portal for clients who live in the community and need additional respite care.

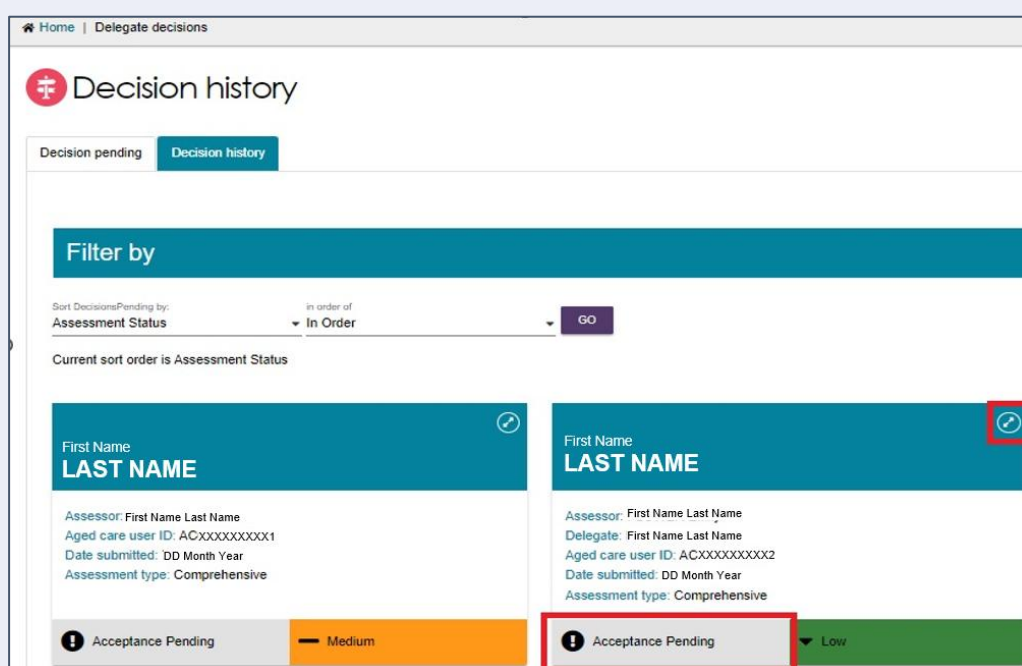
If a client has a current Residential Respite Care approval, needs additional respite days, and lives at home rather than in residential aged care, a service provider cannot request the extension on the client's behalf. In this situation, a Clinical Assessment Delegate must initiate the care extension request.

If you cannot complete a care extension request through the Assessor Portal, contact the Aged Care Service Provider and Assessor Helpline on 1800 836 799.

To make a decision about a care extension, follow the steps below.

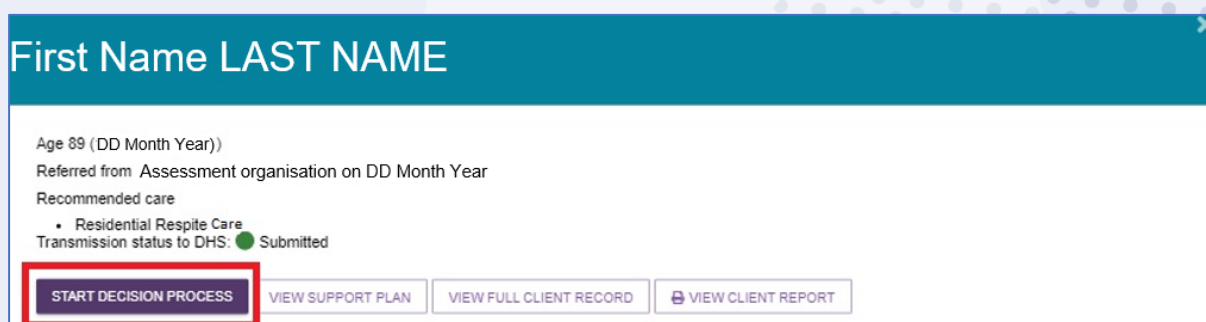
1. The extension request appears in the **Decision Pending** tab under **Unassigned** with a status of **Acceptance Pending**.

Open the client record by selecting the **Expand** icon in either Card View or List View.



2. If the request is not already assigned to you, assign it to yourself. The client will then appear under **My Decisions**.

Select **START DECISION PROCESS**.



3. Review the care extension request and select **MAKE EXTENSION DECISION**.

Support plan and services

PRINT COPY OF SUPPORT PLAN

Identified needs | Goals & recommendations | **Decisions** | Manage services & referrals | Associated People | Review

Current care approvals

Residential Respite Care	
Priority for this care type	Low ?
Approval starts	31 January 2022
Reason for care	zddsad
Source system	Gateway

Recommended care requiring delegate decision

Care extension: Residential Respite Care	
Service provider	ABC Health Care
Proposed extension start date	23 June 2022
Proposed number of extension days	21
Reason for extension	Carer stress
MAKE EXTENSION DECISION	
This extension request is awaiting delegate decision	

4. In the pop-up window, select **Yes** or **No** to approve or decline the extension request. Complete the remaining required fields.

Select **MAKE DECISION**.

Make a care extension decision

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

Do you want to grant the **21 day extension for Residential respite?**

☒ Yes
☐ No

When does the extension start? *

20/07/2017

Rationale *

Maximum 255 characters

MAKE DECISION CANCEL

5. The system displays a confirmation message and updates the extension request status to **Granted** or **Not Granted**.

Support plan and services

Identified needs | Goals & recommendations | **Decisions** | Manage services & referrals | Associated People | Review

Current care approvals

Residential Respite Care

Priority for this care type: Medium ?

Approval starts: 7 September 2022

Source system: Gateway

Care extension: Residential Respite Care

Extension start date: 7 September 2022

Extension stop date: 27 September 2022

Number of extension days: 21

Reason for extension: Severity of the care recipient's condition

Granted

6. (If the service provider submitted the extension request, they will receive a notification of the outcome in **Tasks and Notifications** in the **Services and Support Portal**.)

Type	Due Date	Received Date	Category	Title/Description	Activity Id	Portal
Notification	20/07/2017		Client Services	Care Extension Request A formal Delegate Decision has been made for a care extension request. Details are as follows - Aged Care User Id: AC91417612 Service : Residential Respite High Care Requested By : Requested by Outlet name : Decision : Update Accepted Delegate Name :	1-20851939775	Service Provider Portal