

Assessor Portal User Guide 11 - Assessment Delegate Support Role

The Assessment Delegate Support role in the My Aged Care assessor portal helps the Assessment Delegate with administrative tasks. People assigned this role can print support plans and generate, print and upload referral code letters and approval letters.

Assessment Delegate Support staff carry out these tasks under the direction of the Assessment Delegate.

Clinical Assessment Delegates can approve an older person for all service groups, classification types and classification levels 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

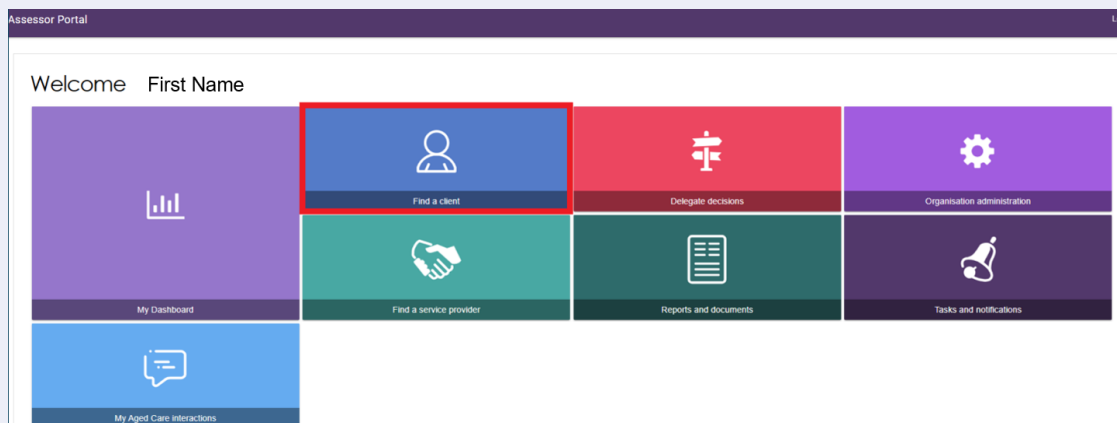
This includes the following classification levels: CHSP class, AT CHSP, and AT-HM.

Contents

Accessing client information	3
Printing the support plan	7
Generating referral code letters	8
Notice of Decision Letters	10
Generating Approval Letters	10
Uploading Approval Letters	13
Generating Non-Approval Letters	18
Uploading Non-Approval Letters	21

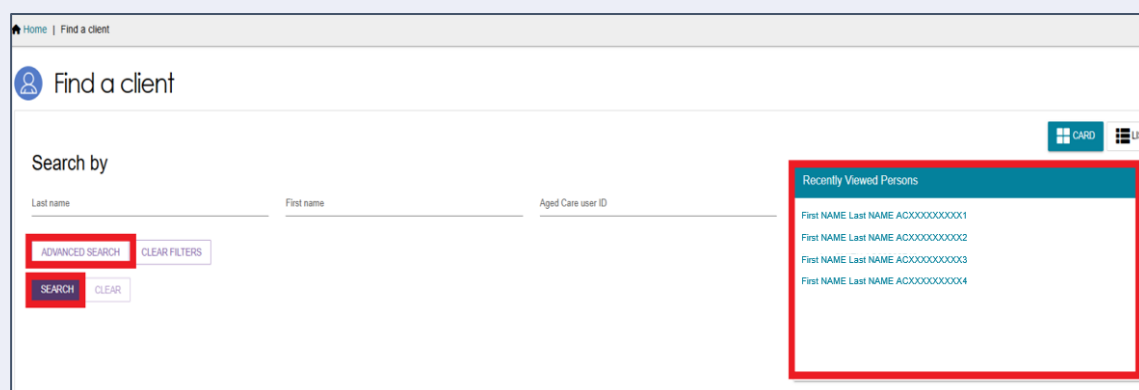
Accessing client information

1. To find a client's information and print a copy of their record, select **Find a client** from your homepage.

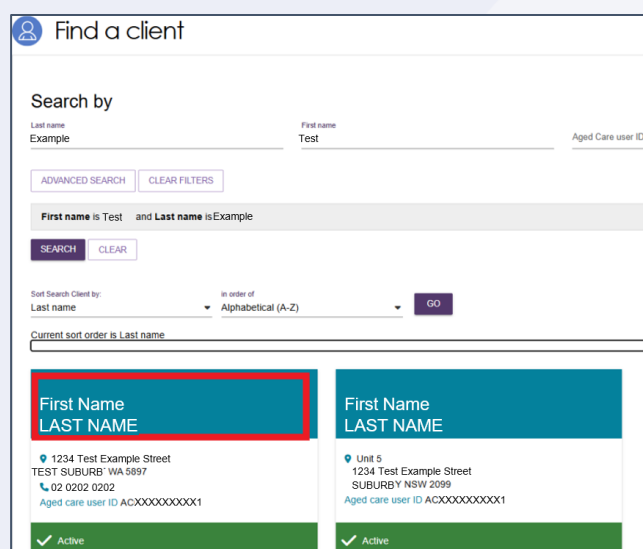


2. Search for the client using the **Find a client** function. The **Recently Viewed Persons** section shows client records you have recently opened. Depending on your browser, this section appears either on the right side of the page or at the bottom.

Use **Advanced Search** to search using additional fields. For more information, refer to the [My Aged Care – Assessor Portal User Guide 1 – Registering and referring clients for assessments](#).



3. Select the client's name from the search results.



4. You can sort the search results by several criteria, including:

- Last name
- First name
- Aged Care User ID
- Suburb
- State
- Postcode
- Date of birth.

Select the sorting criteria and display order you want, then select **GO**.

Find a client

Search by

Last name First name

ADVANCED SEARCH CLEAR FILTERS

SEARCH CLEAR

Sort Search Client by: Last name in order of Alphabetical (A-Z) GO

Last name
First name
Aged Care User ID
Suburb
State
Post code
Date of birth
Client status
Home Contact

First Name
LAST NAME

Unit 5
1234 Test Example Street
SUBURB NSW 2099
Aged care user ID AC50000

✓ Active

5. Select the client's name to open the **Client Summary** page. To view and print the client's record, select **VIEW CLIENT REPORT**.

First Name Last Name
Male, 76 years old, DD Month Year, ACXXXXXXXX1
Test Test AVENUE, TEST SUBURB, NT, 0870
Identifies as Aboriginal

Primary contact First Name Last Name 0411 222 333
No support relationships recorded

Client summary

REFER THIS CLIENT FOR ASSESSMENT **VIEW CLIENT REPORT**

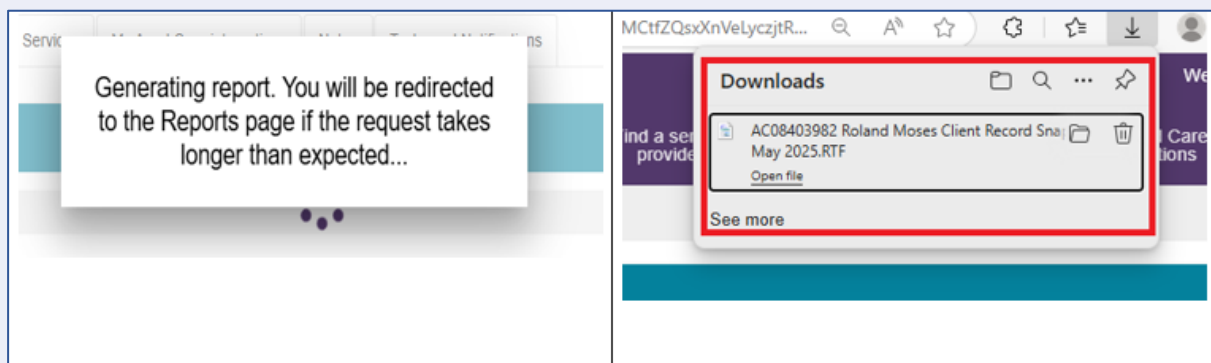
Client summary | Client details | Support network | Approvals | Plans | Attachments | Services | My Aged Care interactions | Notes

Tasks and Notifications | Residential Funding Classifications

Client tracker

Registered — Assessment — Waiting for services — Receiving services

6. A **Generating Report** pop-up appears. When the report is ready, the Rich Text Format (RTF) file opens in your browser. You can then open or download the file.



7. The RTF file contains a copy of the client's record.

First Name Last Name

Aged Care ID: AC XXXXXXXXXX1

Date of Birth: DD/MM/YYYY



Client Details

Age 85

Gender Male

Medicare number
not applicable

DVA Card number
not applicable

Address 1 Test Street, Example Suburb, ACT, 1111



Lives With	Lives alone	Accommodation type	Independent Living
Phone – Home	+61 6161 6161	Phone – Mobile	0404 0404 0404
Email	example@example.com.au	Fax	not applicable
Preferred phone	Home	Preferred correspondence method	not applicable
Country of Birth	England	Ethnicity	British
Preferred Language	English	Requires Help to Communicate	not applicable
TIS Required	not applicable	NRS Required	N
Marital status	Widowed	Aboriginal and/or Torres Strait	No - Neither

Printing the support plan

1. To view and print a support plan, open the client's record and select the **Plans** tab. Then select **Support Plan**.

First Name Last Name
Male, 90 years old, DD Month Year, ACXXXXXXXX1

Primary contact: First Name Last Name
No support relationships recorded

Plans [VIEW CLIENT REPORT](#)

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

Tasks and Notifications

Current Episode
Episode ID: 2-22005EZA
2 February 2026 - Present

SUPPORT PLAN

Recommendations
• Residential Respite Care

Upcoming Review(s)
No upcoming reviews scheduled

Assessment history

- Comprehensive Assessment 2 February 2026
- Screening 2 February 2026

Plan history
No plan history available

Review history
No review history available

2. The **Goals & recommendations** tab opens. To print the support plan, select **PRINT COPY OF SUPPORT PLAN**.

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 2
Recommended classification: SaH Classification 2
AT Low

Client concerns and goals
No client concerns or goals.

Other recommendations

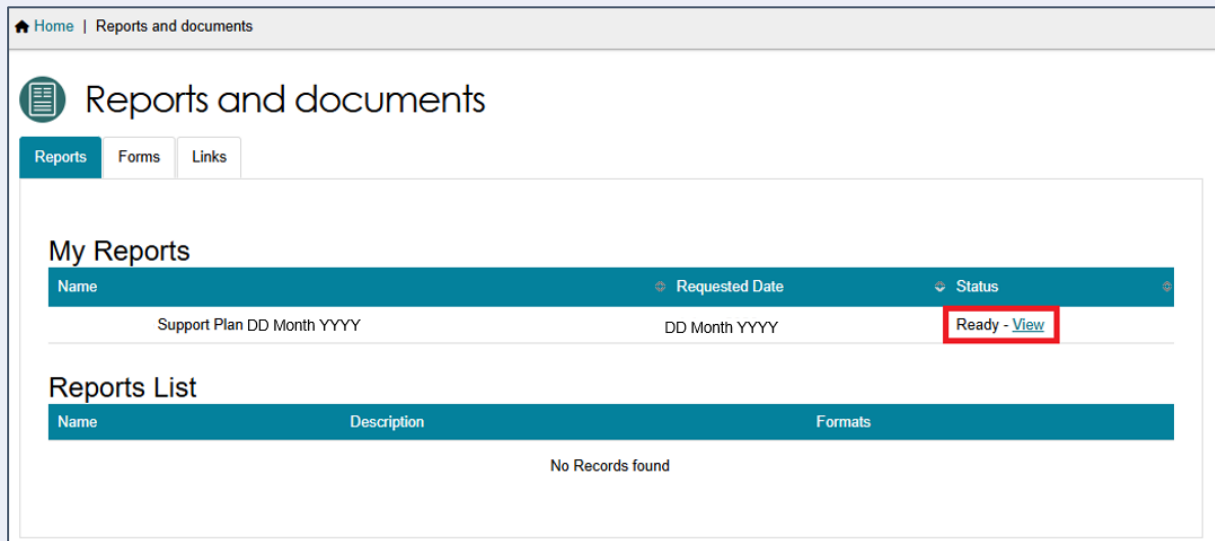
- Recommend that the client receive **Residential Respite Care** 2 February 2026
- Recommend that the client receive **Home support**
- Recommend that the client receive **Assistive technology**

[RETURN TO CLIENT](#)

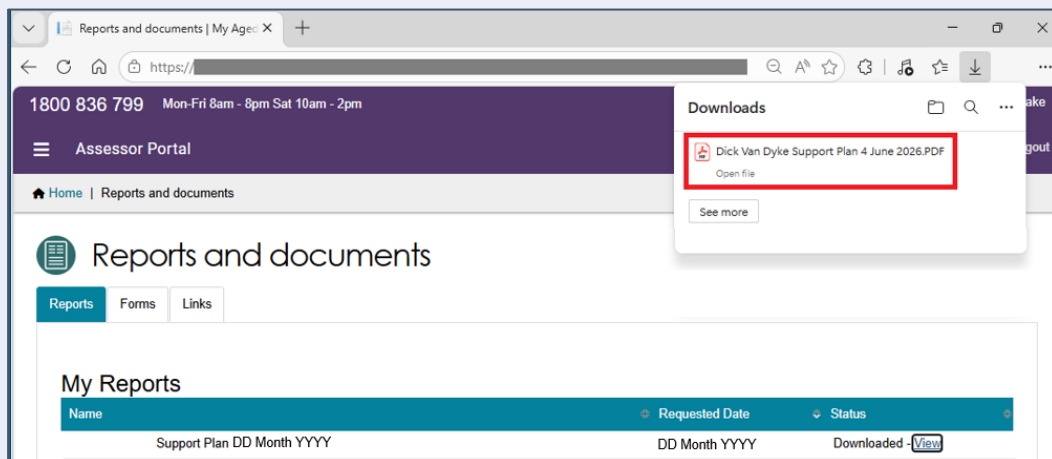
3. If the report takes longer than expected to generate, an information message may appear at the bottom of the screen. Select the link in the message to open the **Reports** page.

i Report is still progressing. To check the status, go to [Reports page](#)

- On the **Reports** page, select **View** to open the support plan. You can also access the **Reports** page from the **Reports and Documents** tile on the Assessor Portal home page.



- When the support plan is ready, download it through your browser and print it from your computer or device. The example below shows a support plan in the **Downloads** section of the Microsoft Edge browser.



Generating referral code letters

- Open the client's record, select the **Plans** tab, and then select **Support Plan**.

First Name Last Name
 Female, 87 years old DD Month Year, ACXXXXXXXX1
 Lot Number 841 2 CEDAR CREEK ROAD CEDAR CREEK, QLD, 4520
 Primary contact: First Name Last Name
[View support network](#)

Plans [VIEW CLIENT REPORT](#)

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

Tasks and Notifications

Current Episode
 Episode ID: 1-4TXQWF3
 26 August 2025 - Present
[SUPPORT PLAN](#)

Recommendations

- Residential Respite Care
- Home maintenance and repairs

Assessment history

- Comprehensive Assessment DD Month Year
- Home Support Assessment DD Month Year
- Home Support Assessment DD Month Year
- Screening DD Month Year

2. Select the **Manage services & referrals** tab. This page shows the client's service referrals and lets you generate a referral code letter.

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 2
 Recommended classification: SaH Classification 2
 AT Low

3. Select **GENERATE REFERRAL CODE 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

Inbound referral details

Services not yet in place

- Help at Home
- Aged Care Homes
- Support at Home

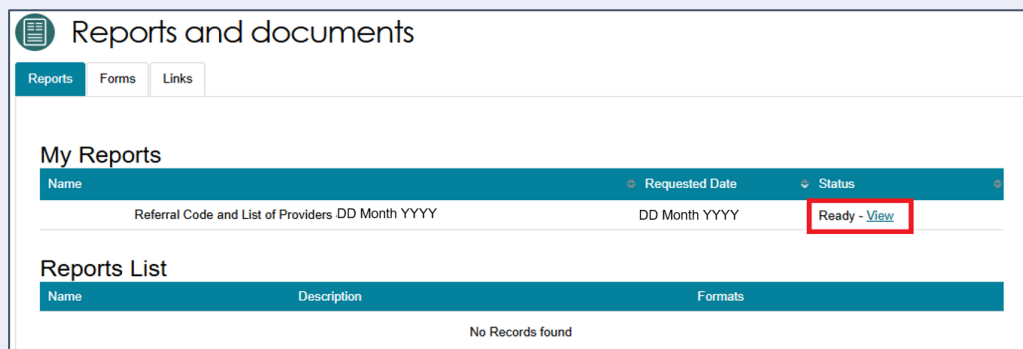
Services in place

- Help at Home

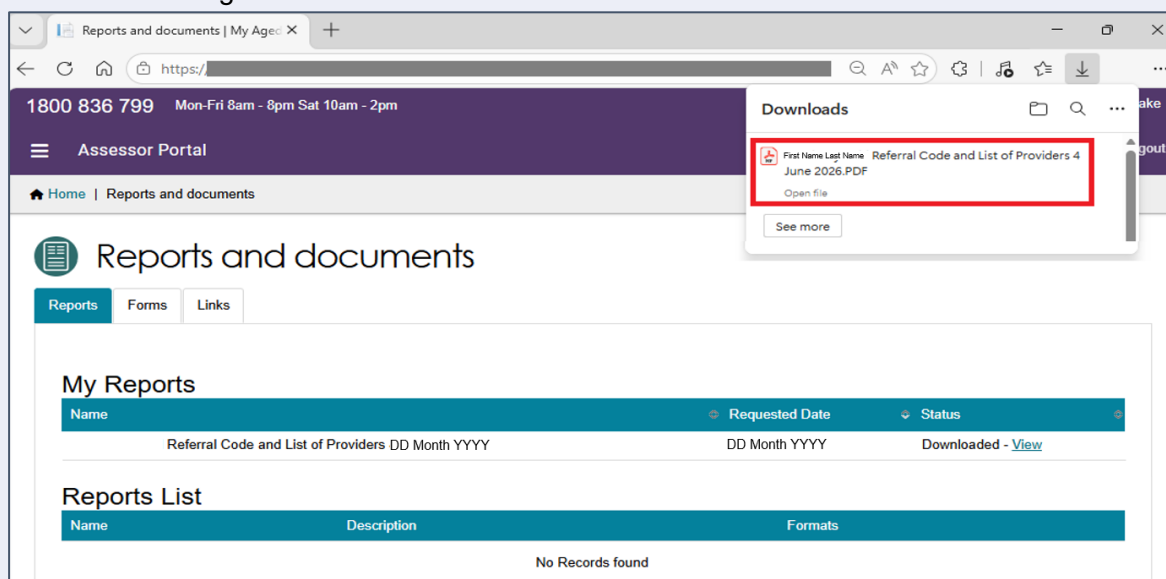
[GENERATE REFERRAL CODE LETTER](#)

[RETURN TO CLIENT](#)

4. When the letter is ready, go to the **Reports** page and select **View** to open it. You can also open the **Reports** page from the **Reports and Documents** tile on the Assessor Portal home page



- Download the referral code letter through your browser and print it from your computer or device. The example below shows a referral code letter in the **Downloads** section of the Microsoft Edge browser.



Notice of Decision Letters

After the Assessment Delegate makes a decision, the **Assessment Delegate Support** can generate and upload the **Notice of Decision (NoD)** letter. This includes both approval letters and non-approval letters.

The system also sends the NoD letter to the older person's registered supporters, except for **supporters-lite**. Refer to [My Aged Care – Assessor Portal User Guide 2 – Registering support people and adding relationships](#) for more information.

Generating Approval Letters

- From the home page, select the **Delegate Decisions** tile. Then select the client from the client card or the list on the **Decision History** tab.

Home | Delegate decisions

Decision history

Currently viewing ABC Outlet

Decision pending **Decision history**

CARD LIST

Filter by

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

Current sort order is Date Submitted 1 to 20 out of 100 matching results

<p>First Name LAST NAME</p> <p>Assessor: LAST NAME First Name Delegate: LAST NAME First Name Aged care user ID: ACXXXXXXXXX1 Date submitted: DD Month Year Assessment type: Comprehensive</p> <p>Finalised (Assessment) Low</p>	<p>First Name LAST NAME</p> <p>Assessor: LAST NAME First Name Delegate: LAST NAME First Name Aged care user ID: ACXXXXXXXXX1 Date submitted: DD Month Year Assessment type: Comprehensive</p> <p>Finalised (Support Plan Review) Low</p>	<p>First Name LAST NAME</p> <p>Assessor: LAST NAME First Name Delegate: LAST NAME First Name Aged care user ID: ACXXXXXXXXX1 Date submitted: DD Month Year Assessment type: Comprehensive</p> <p>Delegate Decision Complete (Assessment) Medium</p>
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2. Select **VIEW SUPPORT PLAN**.

First Name LAST NAME

Age 71 (DD Month YYYY) Referred from ABC Outlet on DD Month YYYY

Recommended care:

- Domestic assistance
- Personal care
- Transport

Home support Ongoing - SaH Classification 7

VIEW SUPPORT PLAN VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

3. The client's **Decisions** tab on the **Support Plan and Services** page opens.
Select **GENERATE 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

IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment

Existing classification: SaH Classification 7

IAT Outcome: SaH Classification 7

CHSP

Current care approvals

 Recommend that the client receive

Home support

Delegate decisions and comments

Assessment: Submitted on 3 June 2026

Assessment: Submitted on 10 April 2026

GENERATE APPROVAL LETTER

UPLOAD APPROVAL LETTER

RETURN TO CLIENT

4. Confirm the client's name, then select **GENERATE APPROVAL LETTER**.

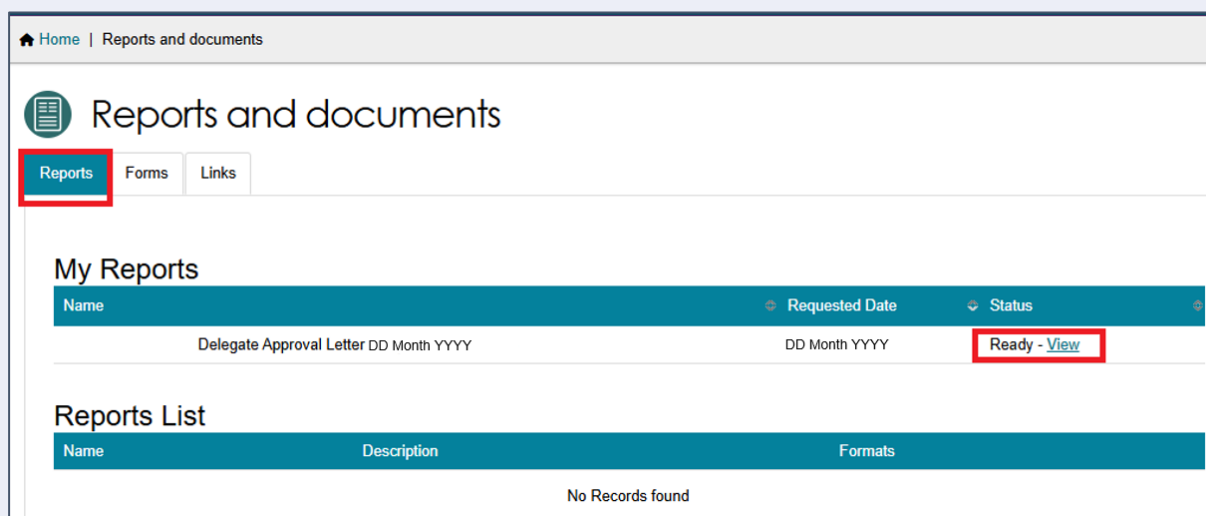
Generate approval letter

You are generating the approval letter for First Name LAST NAME

GENERATE APPROVAL LETTER

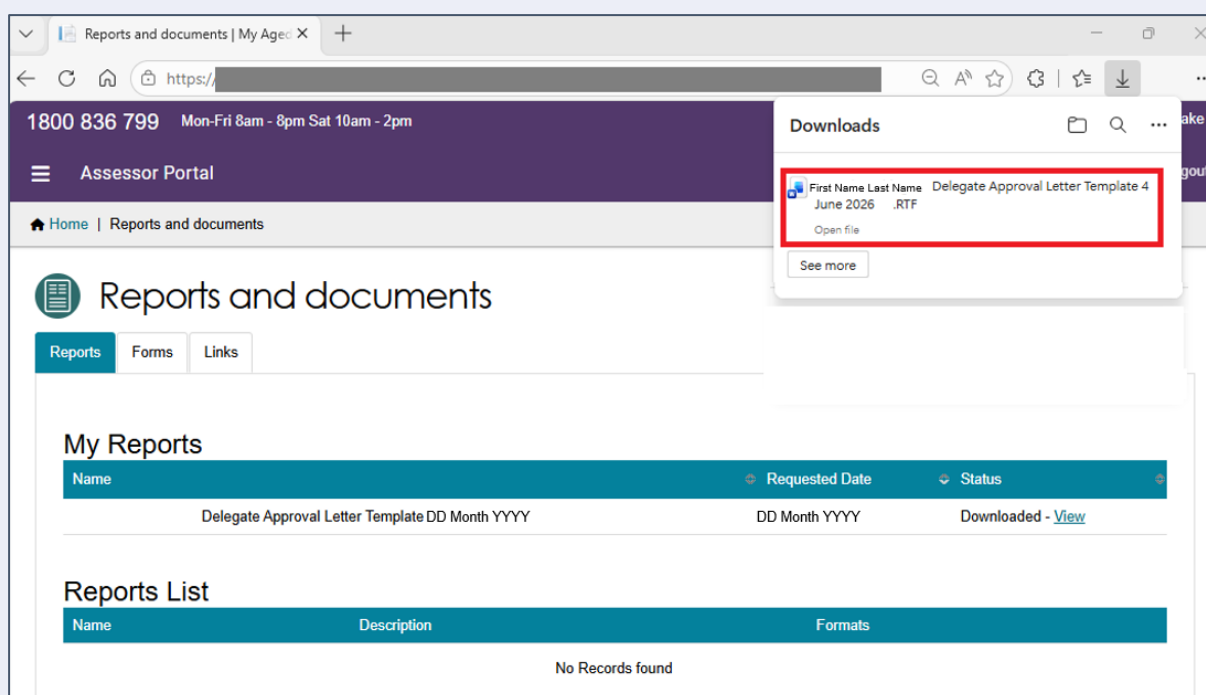
CANCEL

5. The letter appears in the **Reports and Documents** section of the portal with a status of **Processing**. When the letter is ready, the status changes and a **View** link appears. Open the letter using the **View** link.



6. Your browser downloads the letter to your computer or device as a Rich Text Format (**RTF**) document. You can then print the letter for the Assessment Delegate to sign.

! The Assessment Delegate must sign all Notice of Decision (NoD) letters. Before you upload a signed letter to the portal, save or convert it to PDF format.



Uploading Approval Letters

After the Assessment Delegate signs the letter, upload it to the client's record using the **Upload Approval Letter** button on the Decisions tab of the support plan.

You can also upload the letter from the Attachments tab in the client record by selecting **Add an Attachment**.

For **CHSP-only recommendations**, you can upload Notice of Decision (NoD) letters from the Goals & Recommendations tab.

For **second-unit Restorative Care Pathway (RCP)** approval letters, complete the **Second Concurrent Unit of RCP Funding – Approval or Non-approval** template in the Reports and Documents section of the Assessor Portal. Once you complete the template, use **Upload Approval Letter** to upload the letter to the client's record.

Second Concurrent Unit of RCP Funding letter template

Assessor Portal Logout

Home | Reports and documents

Reports and documents

Reports Forms Links

Forms

- Self-Service Form - Abbey Pain Scale [pdf 216.57KB]
- Self-Service Form - Alcohol Use Disorders Identification Test [pdf 286.85KB]
- Self-Service Form - Application for Care - October 2020 [pdf 354.04KB]
- Self-Service Form - Barthel Index of Activities of Daily Living [pdf 217.14KB]
- Self-Service Form - Brief Pain Inventory [pdf 256.86KB]
- Self-Service Form - Caregiver Strain Index [pdf 148.46KB]
- Self-Service Form - Comprehensive Assessment and Support Plan - October 2018 [pdf 441.98KB]
- Self-Service Form - Geriatric Depression Scale [pdf 217.91KB]
- Self-Service Form - Home Support Assessment and Support Plan - October 2018 [pdf 483.96KB]
- Self-Service Form - IQ CODE [pdf 218.93KB]
- Self-Service Form - K-10 [pdf 943.17KB]
- Self-Service Form - KICA-COG images [pdf 539.52KB]
- Self-Service Form - Kimberley Indigenous Cognitive Assessment - ADL [pdf 148.55KB]
- Self-Service Form - Kimberley Indigenous Cognitive Assessment - Carer [pdf 695.12KB]
- Self-Service Form - Kimberley Indigenous Cognitive Assessment - Cognitive Assessment (KICA-COG) [pdf 895.81KB]
- Downloads - Mini Nutritional Assessment [pdf 81.38KB]
- Downloads - Mini Nutritional Assessment Tool v1.0 [pdf 307.28KB]
- Self-Service Form - Modified Caregiver Strain Index [pdf 217.44KB]
- Template - Notice of Decision - Approval letter - CHSP ONLY [docx 185.89KB]
- Template - Notice of Decision - Non-Approval letter [docx 181.32KB]
- Self-Service Form - Offline Approval Form - February 2017 [docx 113.64KB]
- Self-Service Form - Older Americans Resources and Services (OARS) - Instrumental ADL [pdf 942.75KB]
- Self-Service Form - Oral Health Assessment Tool [pdf 217.37KB]
- Self-Service Form - Residents Verbal Brief Pain Inventory [pdf 247.28KB]
- Self-Service Form - Revised Faecal Incontinence Scale [pdf 216.65KB]
- Self-Service Form - Revised Urinary Incontinence Scale [pdf 148.11KB]
- Self-Service Form - Rowland Universal Dementia Assessment Scale [pdf 981.57KB]
- Template - Second concurrent unit of RCP funding - Approval or Non-approval [docx 80.88KB]**
- Downloads - Sensitive Attachment v1.0 [docx 62.40KB]
- Self-Service Form - South Australian Oral Health Referral Pad [pdf 217.59KB]
- Self-Service Form - Standardised Mini-Mental State Examination (SMMSE) [pdf 289.86KB]

From the support plan

1. Open the client's record 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

- The **Support Plan and Services** page opens. Select the **Decisions** tab, then select **Upload Approval Letter** at the bottom of the page under **Delegate decisions and comments**.

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 7

Current care approvals

Recommend that the client receive
Home support

Delegate decisions and comments

Support Plan Review: Submitted on 1 October 2025

Assessment: Submitted on 9 July 2025

UPLOAD APPROVAL LETTER

REQUEST/CHANGE NOTIFICATION OF SAH CORRESPONDENCE | RETURN TO CLIENT

- The **Upload Approval Letter** window opens. Select the approval letter file you want to upload.

Enter a name for the attachment. Make sure the **Attachment Type** is set to **Approval letter sent to client**.

You can also enter a short description of the attachment.

Select **UPLOAD** to add the letter to the client's record.

Upload approval letter

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, .rtf, .txt

Approval letter to upload *

Choose file | No file chosen

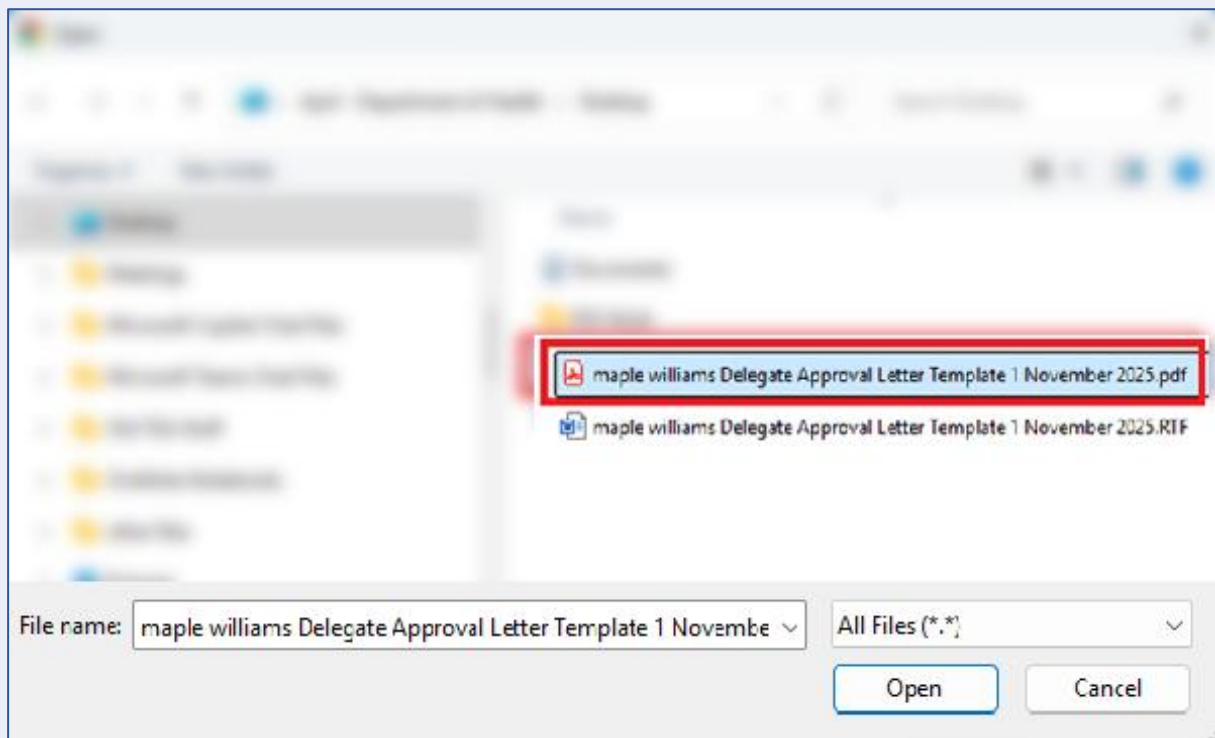
Name of the attachment *
(150 characters)

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
(250 characters)

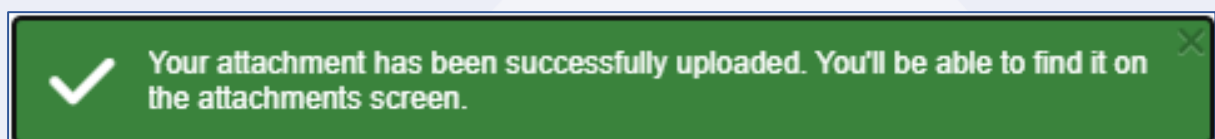
UPLOAD | CANCEL

- Choose the letter and then select **Open**.



5. The file name appears next to the **Choose File** button. Select **Upload**.

6. A confirmation message appears to let you know the upload was successful. You can now find the letter in the **Attachments** tab of the client's record.



From the attachments tab

You can also upload the letter from the **Attachments** tab in the client's record.

1. Open the client's record and select the **Attachments** tab. Then select **Add an Attachment**.

The screenshot shows the 'Attachments' tab selected in a client record. The 'ADD AN ATTACHMENT' button is highlighted with a red box. Below it, there are tabs for 'Assessment Attachments', 'Other Attachments', and 'Correspondence'. The 'Correspondence' tab is currently selected, and it shows 'No attachments found to be displayed.'

2. Select **Choose File**.

The screenshot shows the 'Add an attachment' dialog box. It includes a warning message: '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.' Below this, it states: '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 *'. The 'CHOOSE FILE' button is highlighted with a red box, and the text 'No file chosen' is displayed next to it.

3. Select the approval letter and then select **Open**.

The screenshot shows a file selection dialog box. The file 'maple williams Delegate Approval Letter Template 1 November 2025.pdf' is selected and highlighted with a red box. Below the file list, the 'File name' field shows 'maple williams Delegate Approval Letter Template 1 Novembe' and the file type is set to 'All Files (*.*)'. The 'Open' button is visible at the bottom right.

4. The file name appears next to the **Choose File** button.

Enter a name for the attachment. Select **Approval Letter Sent to Client** as the attachment type. If needed, add a short description, such as the assessment date and time.

Select Upload.

Home | Find a client |

First Name Last Name
 Female, 75 years old, DD Month Year, ACXXXXXXXX1
 Lot Number 1 Test Street, Example Suburb, ACT, 1111

Primary contact: First Name Last Name
 No support relationships recorded

Attachments [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

Attachments

[ADD AN ATTACHMENT](#)

Assessment Attachments | Other Attachments | Correspondence

Approval Letter Sent to Client 4 November 2025
 Delegate Approval Letter 1 November 2025 [pdf 311.38KB] [HIDE FROM VIEW](#)

Support Plan - External 14 July 2025
 AC72685944__2-21UJRNPT-Finalised-20251407092811.pdf [65.18KB]

Accessibility | Privacy | Disclaimer | Terms | Copyright © Commonwealth of Australia

 Your attachment has been successfully uploaded. You'll be able to find it on the attachments screen.

Australian Government
Department of Health and Aged Care

 myagedcare

5. The letter now appears under the **Assessment Attachments** tab of the **Attachments** page.

Generating Non-Approval Letters

1. From the home page, select the **Delegate Decisions** tile. Then select the client from the client card or the list on the **Decision History** tab.

Home | Delegate decisions

Decision history

Currently viewing ABC Outlet

Decision pending **Decision history**

CARD LIST

Filter by

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

Current sort order is Date Submitted 1 to 1 out of 1 matching result

First Name
LAST NAME

Assessor: LAST NAME First Name
 Delegate: LAST NAME First Name
 Aged care user ID: AC-XXXXXXXXX1
 Date submitted: DD Month Year
 Assessment type: Home Support

Delegate Decision Complete (Assessment) Low

2. Select **VIEW SUPPORT PLAN**.

First Name LAST NAME

Age 76 (DD Month YYYY) Referred from ABC Outlet on DD Month YYYY

Recommended care:

- No Care Approval

VIEW SUPPORT PLAN VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

3. The client's **Decisions** tab on the **Support Plan and Services** page opens. 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

IAT Outcome and Classifications

Current assessment type: Home Support Assessment
IAT Outcome: CHSP

Delegate decisions and comments

Assessment: Submitted on 8 May 2026

Decisions

Recommend that the client receive
No Care Approval

Meals

Decision date (Assessment)
4 June 2026

Personal care

Transport

[GENERATE NON-APPROVAL LETTER](#) [UPLOAD NON-APPROVAL LETTER](#)

[RETURN TO CLIENT](#)

4. The system starts generating the non-approval letter and saves it in the **Reports and Documents** section of the portal. When the letter is ready, a **View** link appears in the **Status** column.

[Home](#) | Reports and documents

Reports and documents

Reports | Forms | Links

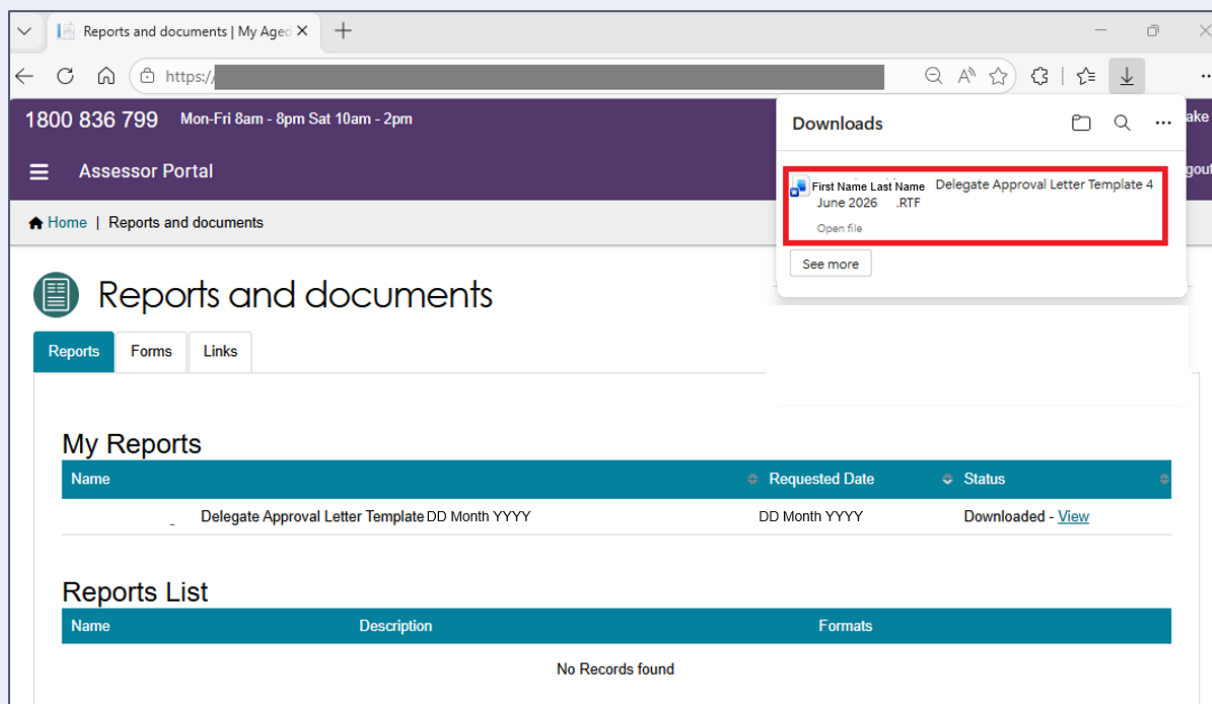
My Reports

Name	Requested Date	Status
Delegate Non-Approval Letter Template DD Month YYYY	DD Month YYYY	Ready - View

Reports List

Name	Description	Formats
No Records found		

5. Select **View** to open the letter. Your browser downloads the letter to your computer or device as a Rich Text Format (**RTF**) document. You can then print the letter for the Assessment Delegate to sign.



! The Assessment Delegate must sign all Notice of Decision (NoD) letters. Before you upload a signed letter to the portal, save or convert it to PDF format.

Uploading Non-Approval Letters

After the Assessment Delegate signs the letter, upload it to the client's record using **Upload Non-Approval Letter** on the **Decisions** tab of the support plan.

You can also upload the letter from the **Attachments** tab in the client's record by selecting **Add an Attachment**.

For **Comprehensive Assessments**, the **Upload Non-Approval Letter** option is only available for **No Care Approval** decisions and similar outcomes.

For **CHSP-only recommendations**, you can also upload Notice of Decision (NoD) letters from the **Goals & Recommendations** tab.

For **second-unit Restorative Care Pathway (RCP)** non-approval letters, complete the **Second Concurrent Unit of RCP Funding – Approval or Non-approval** template in the **Reports and Documents** section of the Assessor Portal.

Once you complete the template, use **Upload Non-Approval Letter** to upload the letter to the client's record.

Second Concurrent Unit of RCP Funding letter template

Assessor Portal Logout

Home | Reports and documents

Reports and documents

Reports **Forms** Links

Forms

- Self-Service Form - Abbey Pain Scale [pdf 216.57KB]
- Self-Service Form - Alcohol Use Disorders Identification Test [pdf 286.85KB]
- Self-Service Form - Application for Care - October 2020 [pdf 354.04KB]
- Self-Service Form - Barthel Index of Activities of Daily Living [pdf 217.14KB]
- Self-Service Form - Brief Pain Inventory [pdf 256.86KB]
- Self-Service Form - Caregiver Strain Index [pdf 148.46KB]
- Self-Service Form - Comprehensive Assessment and Support Plan - October 2018 [pdf 441.98KB]
- Self-Service Form - Geriatric Depression Scale [pdf 217.91KB]
- Self-Service Form - Home Support Assessment and Support Plan - October 2018 [pdf 483.96KB]
- Self-Service Form - IQ CODE [pdf 218.93KB]
- Self-Service Form - K-10 [pdf 943.17KB]
- Self-Service Form - KICA-COG images [pdf 539.52KB]
- Self-Service Form - Kimberley Indigenous Cognitive Assessment - ADL [pdf 148.55KB]
- Self-Service Form - Kimberley Indigenous Cognitive Assessment - Carer [pdf 695.12KB]
- Self-Service Form - Kimberley Indigenous Cognitive Assessment - Cognitive Assessment (KICA-COG) [pdf 895.81KB]
- Downloads - Mini Nutritional Assessment [pdf 81.38KB]
- Downloads - Mini Nutritional Assessment Tool v1.0 [pdf 307.28KB]
- Self-Service Form - Modified Caregiver Strain Index [pdf 217.44KB]
- Template - Notice of Decision - Approval letter - CHSP ONLY [docx 185.89KB]
- Template - Notice of Decision - Non-Approval letter [docx 181.32KB]
- Self-Service Form - Offline Approval Form - February 2017 [docx 113.64KB]
- Self-Service Form - Older Americans Resources and Services (OARS) - Instrumental ADL [pdf 942.75KB]
- Self-Service Form - Oral Health Assessment Tool [pdf 217.37KB]
- Self-Service Form - Residents Verbal Brief Pain Inventory [pdf 247.28KB]
- Self-Service Form - Revised Faecal Incontinence Scale [pdf 216.65KB]
- Self-Service Form - Revised Urinary Incontinence Scale [pdf 148.11KB]
- Self-Service Form - Rowland Universal Dementia Assessment Scale [pdf 981.57KB]
- Template - Second concurrent unit of RCP funding - Approval or Non-approval [docx 80.88KB]**
- Downloads - Sensitive Attachment v1.0 [docx 62.40KB]
- Self-Service Form - South Australian Oral Health Referral Pad [pdf 217.59KB]
- Self-Service Form - Standardised Mini-Mental State Examination (SMMSE) [pdf 289.86KB]

From the support plan

1. Open the client's record 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. The **Support Plan and Services** page opens. Select the **Decisions** tab, then select **Upload Non-Approval Letter** at the bottom of the page under **Delegate decisions and comments**.

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 6

Current care approvals

Delegate decisions and comments

Assessment: Submitted on 5 February 2026

Decisions

No Change to Existing Care Approvals
Priority for this care type: High ?
Approval starts: 5 February 2026
● Agreed

Recommend that the client receive
Home support

Decision date (Assessment)
5 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

3. In the Upload Non-Approval Letter window, select Choose File.

Upload non-approval letter

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, .rtf, .txt

Non-approval letter to upload *

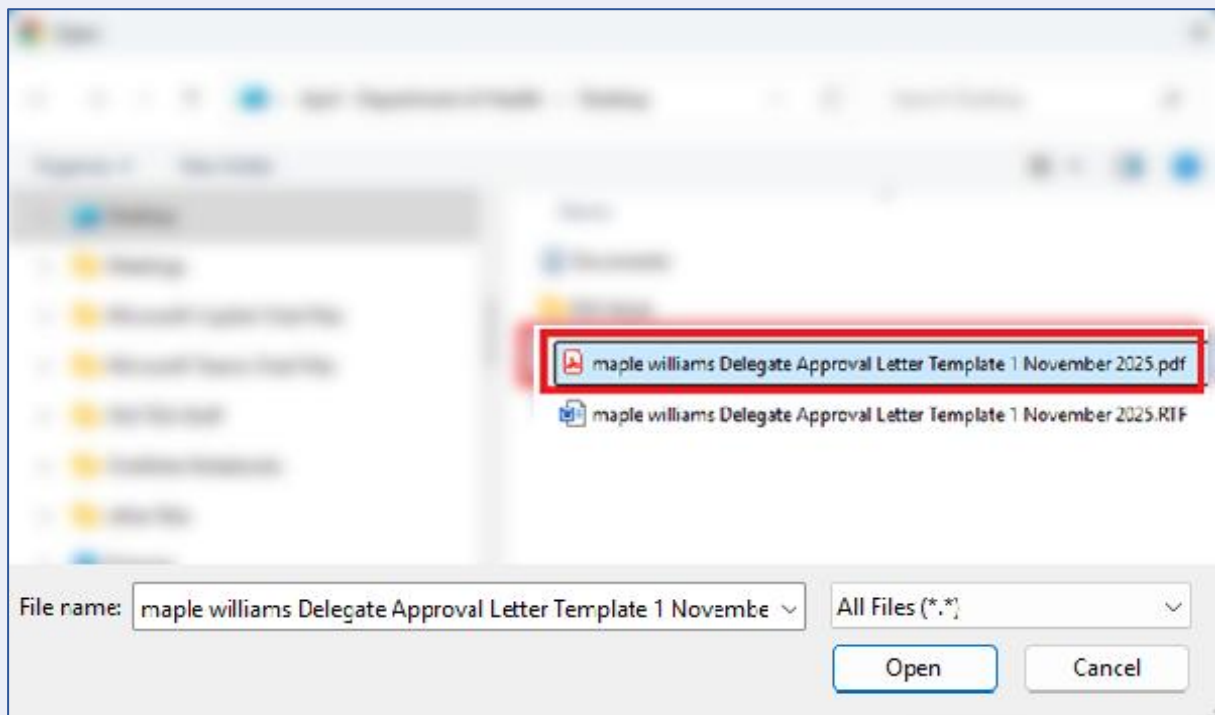
Choose file No file chosen

Name of the attachment * Type of attachment *
(150 characters) Non-Approval Letter to Client

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

UPLOAD CANCEL

4. Select the letter you want to upload, then select **Open**.

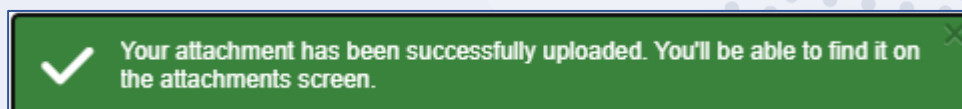


5. The file name appears next to the **Choose File** button. Enter a name for the letter and make sure the **Attachment Type** is set to **Non-Approval Letter to Client**.

You can also add a short description of the letter if needed.

Select **UPLOAD**.

6. A confirmation message appears to let you know the upload was successful. You can now find the letter in the **Attachments** tab of the client's record.



From the attachments tab

You can also upload the letter from the **Attachments** tab in the client's record.

1. Open the client's record and select the **Attachments** tab. Then select **Add an Attachment**.

The screenshot shows the 'Attachments' tab selected in a client record. The 'Attachments' tab is highlighted with a red box. Below it, the 'ADD AN ATTACHMENT' button is also highlighted with a red box. The 'Correspondence' sub-tab is selected, and it shows 'No attachments found to be displayed.'

2. In the **Add an Attachment** window, select **Choose File**.

The screenshot shows the 'Add an attachment' window. The 'CHOOSE FILE' button is highlighted with a red box. The window contains a note about file visibility, a list of accepted file types, and a 'No file chosen' status.

3. Select the non-approval letter you want to upload, then select **Open**.

The screenshot shows a file selection dialog box. The file 'Maple Williams Delegate Non-Approval Letter' is selected and highlighted with a red box. The 'Open' button is also highlighted with a red box. The dialog box shows the file name and the file type 'All Files (*.*)'.

4. The file name appears next to the **Choose File** button. Enter a name for the attachment and select **Non-Approval Letter Sent to Client** as the attachment type.

If needed, add a short description, such as the assessment date and time.

Select **Upload**.

Add an attachment

i 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 Maple Will...y 2025.pdf

Name of the attachment: * Maple Williams Delegate Non-Approval Letter 1 July 2025

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

(250 characters)

UPLOAD CANCEL

5. The letter now appears under the **Assessment Attachments** tab of the **Attachments** page.

Home | Find a client |

First Name Last Name
Female, 76 years old, DD Month Year, ACXXXXXXXXX1
1 Test Street, Example Suburb, ACT, 1111

Primary contact: First Name Last Name
No support relationships recorded

Attachments

VIEW CLIENT REPORT

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

Tasks and Notifications

Attachments

ADD AN ATTACHMENT

Assessment Attachments | Other Attachments | Correspondence

Non-Approval Letter to Client
Non-Approval Letter 1 July 2025_260604155006 [pdf 84.10KB] **HIDE FROM VIEW** 4 June 2026

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✓ Your attachment has been successfully uploaded. You'll be able to find it on the attachments screen.

Australian Government Department of Health and Aged Care myagedcare