Australian Government | myagedcare

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.

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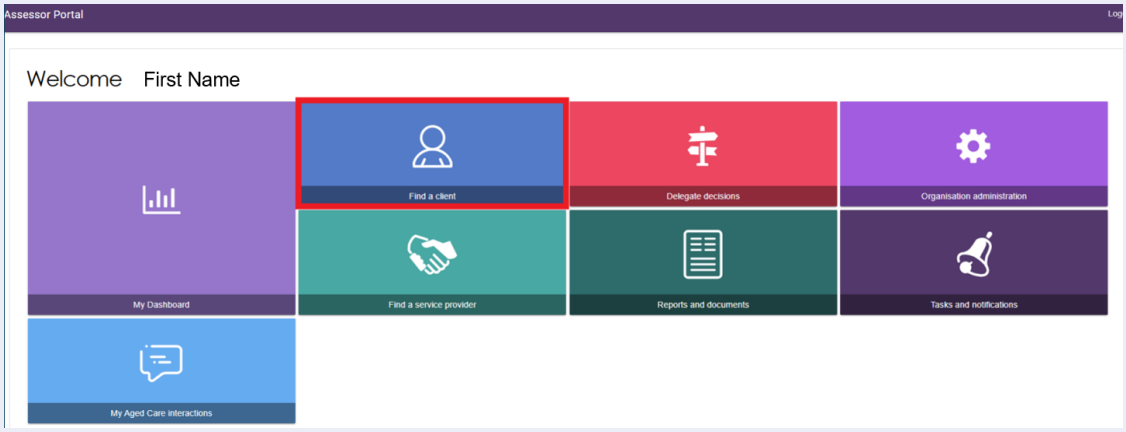
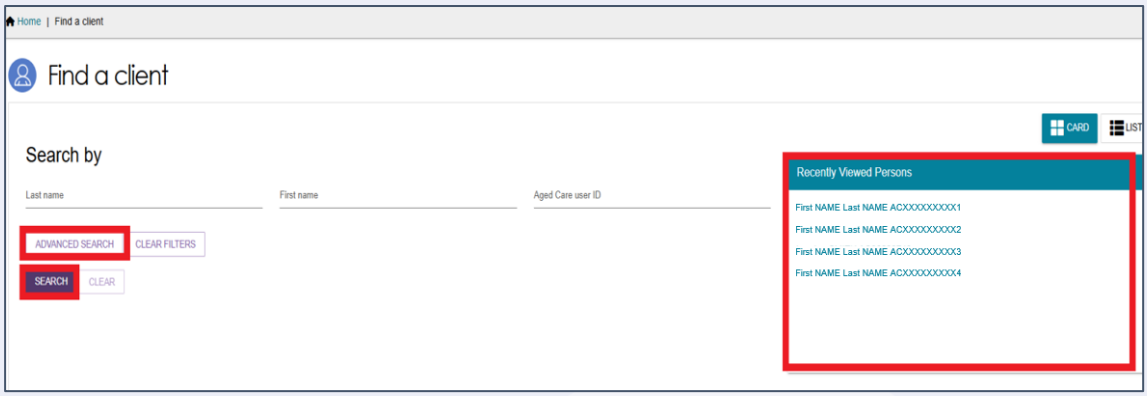
Accessing client information

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

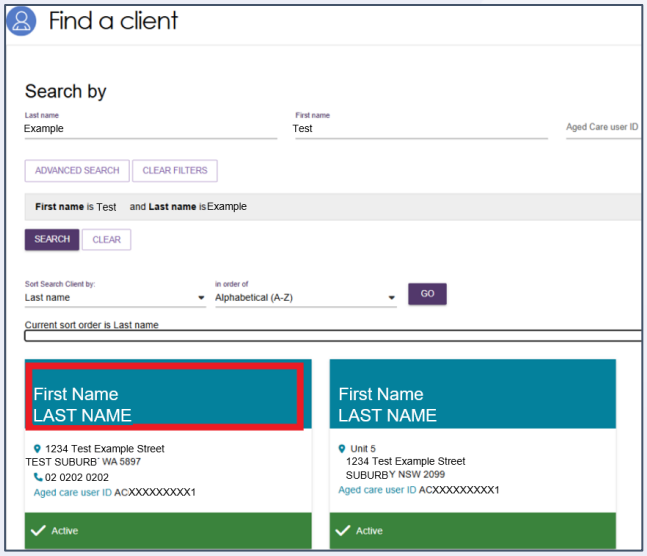


2. Search for the client using the **Find a client** function. The **Recently Viewed Persons** section shows client records you have recently opened. Depending on your browser, this section appears either on the right side of the page or at the bottom.

   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 .

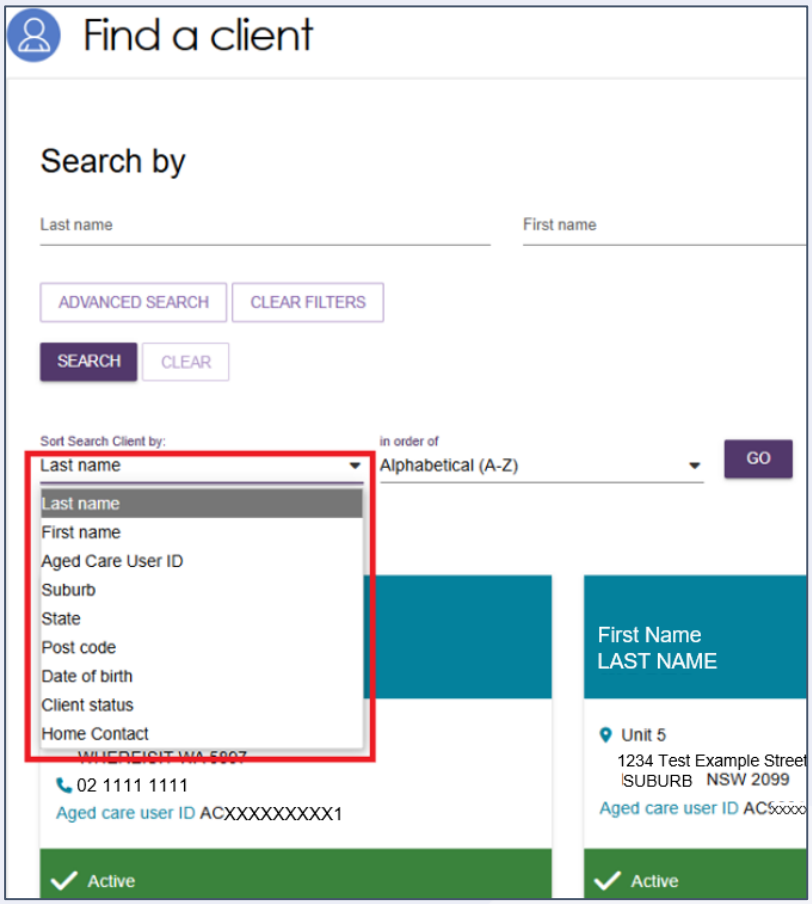


3. Select the client's name from the search results.

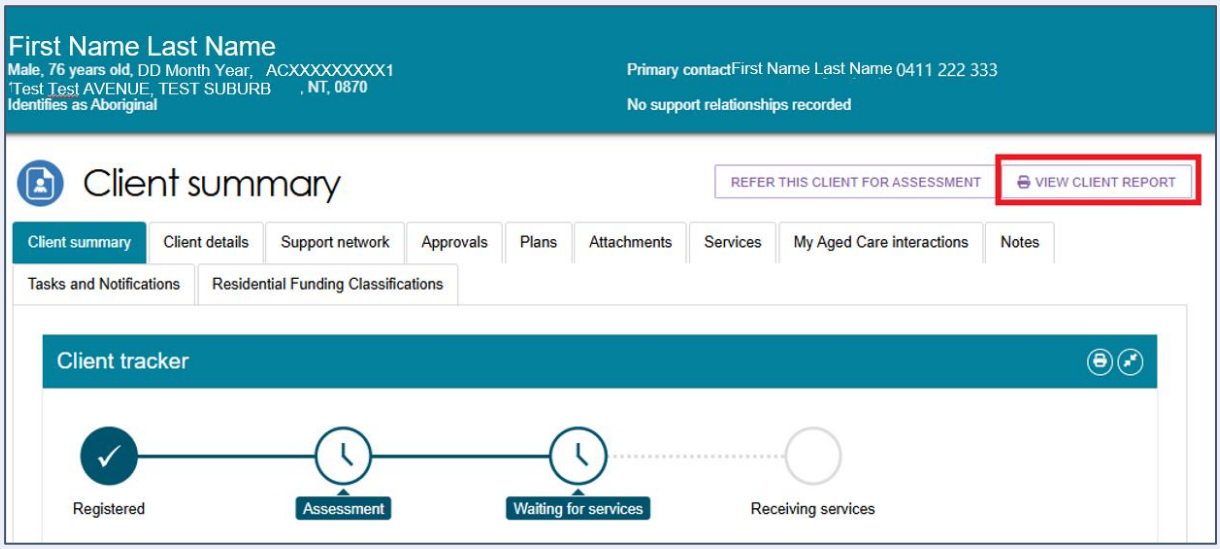


4. You can sort the search results by several criteria, including:
    - Last name
    - First name
    - Aged Care User ID
    - Suburb
    - State
    - Postcode
    - Date of birth.

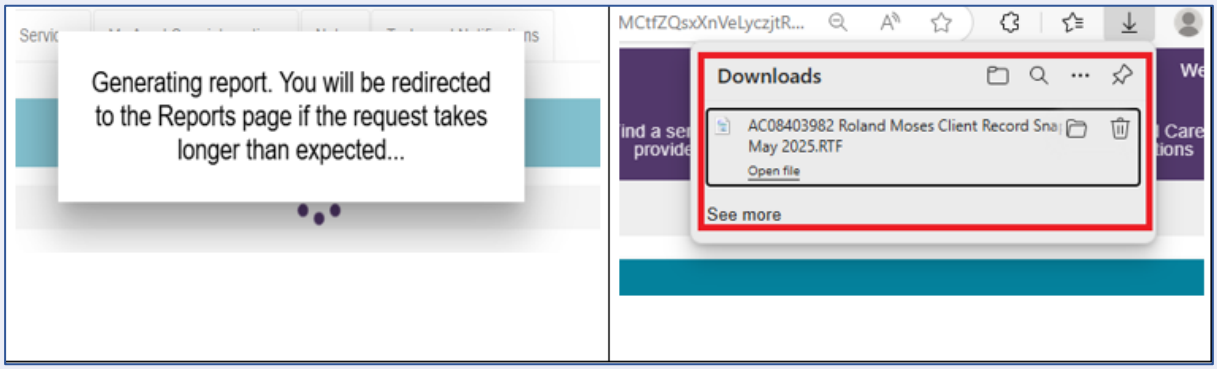
Select the sorting criteria and display order you want, then select **GO**.



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



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.

Australian Government
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First Name Last Name

Aged Care ID: AC XXXXXXXXX1

Date of Birth: DD/MM/YYYY

Client Details

Age 85 **Gender** Male

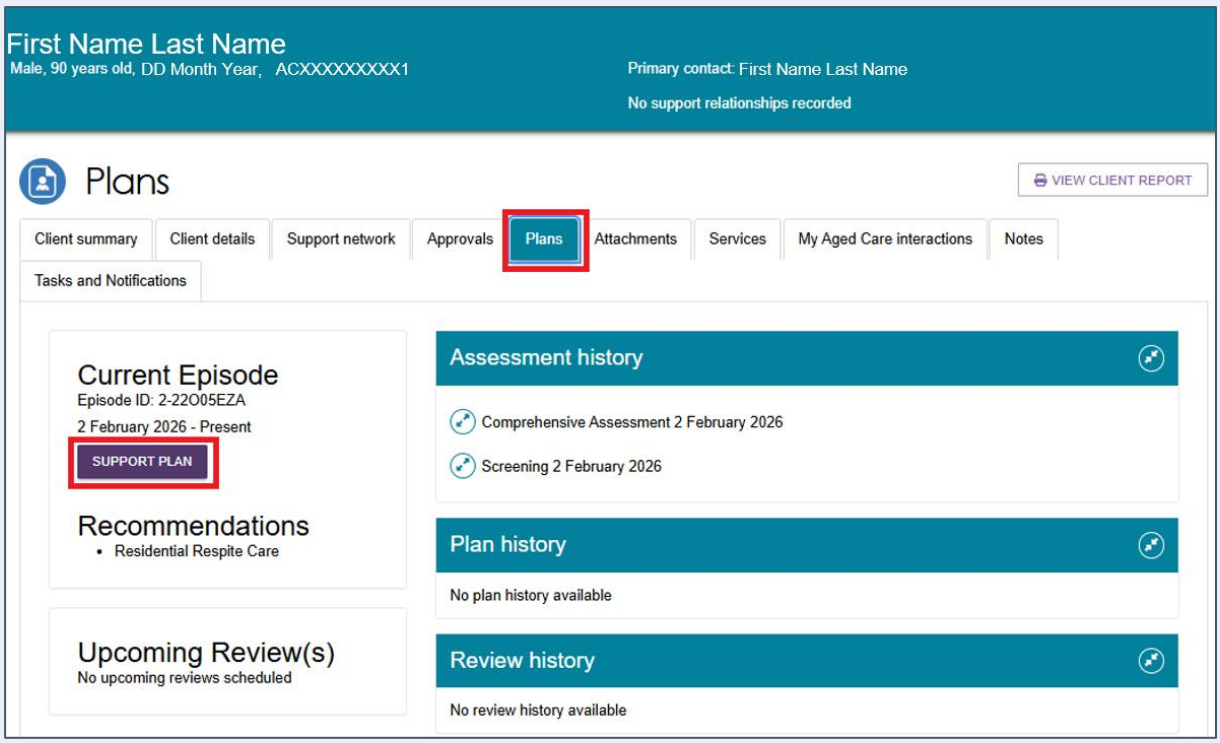
Medicare number not applicable **DVA Card number** not applicable

Address 1 Test Street, Example Suburb, ACT, 1111

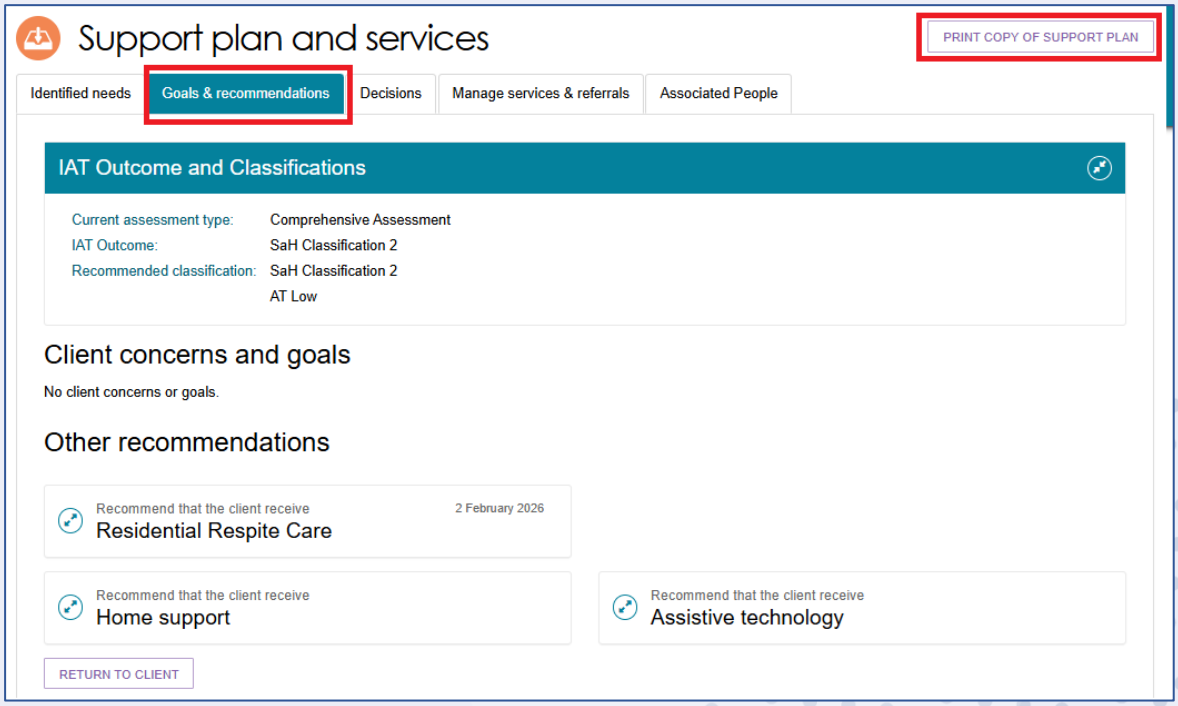
Lives With	Lives alone	**Accommodation type**	Independent Living
Phone – Home	+61 6161 6161	**Phone – Mobile**	0404 0404 0404
Email	example@example.com.au	**Fax**	not applicable
Preferred phone	Home	**Preferred correspondence method**	not applicable
Country of Birth	England	**Ethnicity**	British
Preferred 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

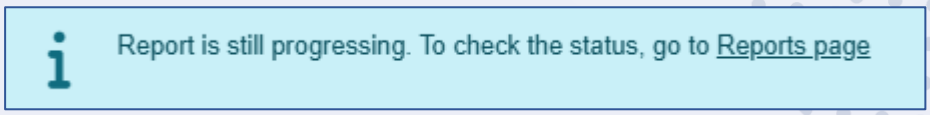
1. To view and print a support plan, open the client's record and select the **Plans** tab. Then select **Support Plan**.



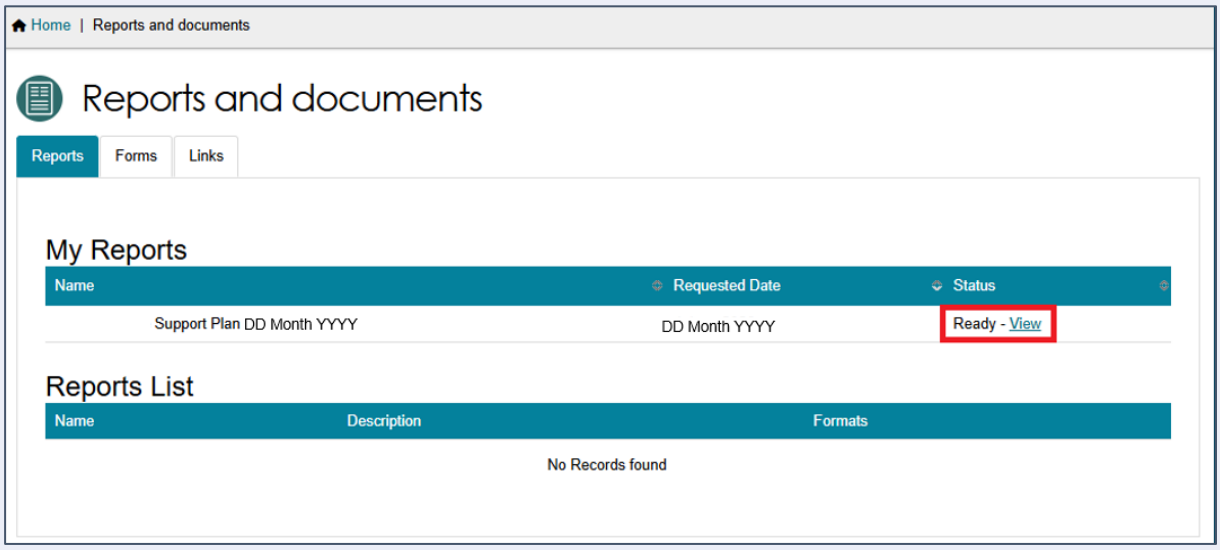
2. The **Goals & recommendations** tab opens. To print the support plan, select **PRINT COPY OF SUPPORT PLAN**.



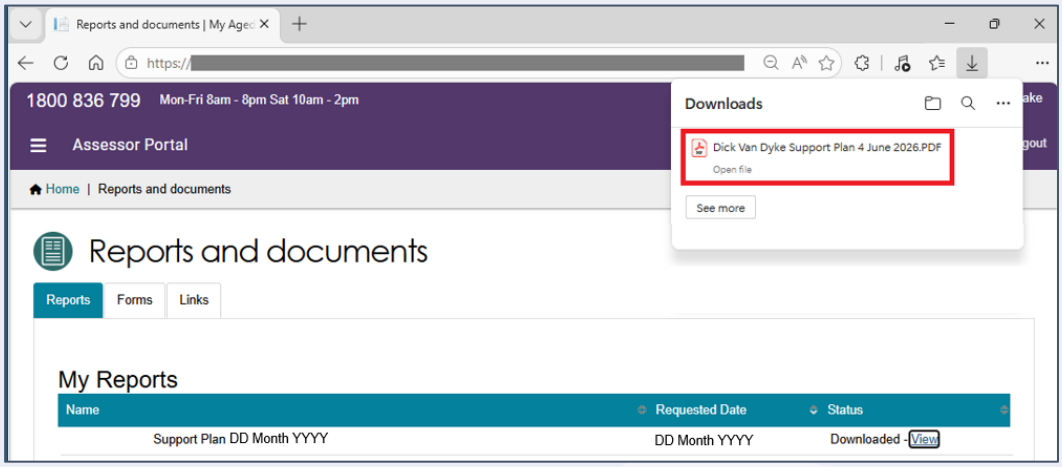
3. If the report takes longer than expected to generate, an information message may appear at the bottom of the screen. Select the link in the message to open the **Reports** page.



4. 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.

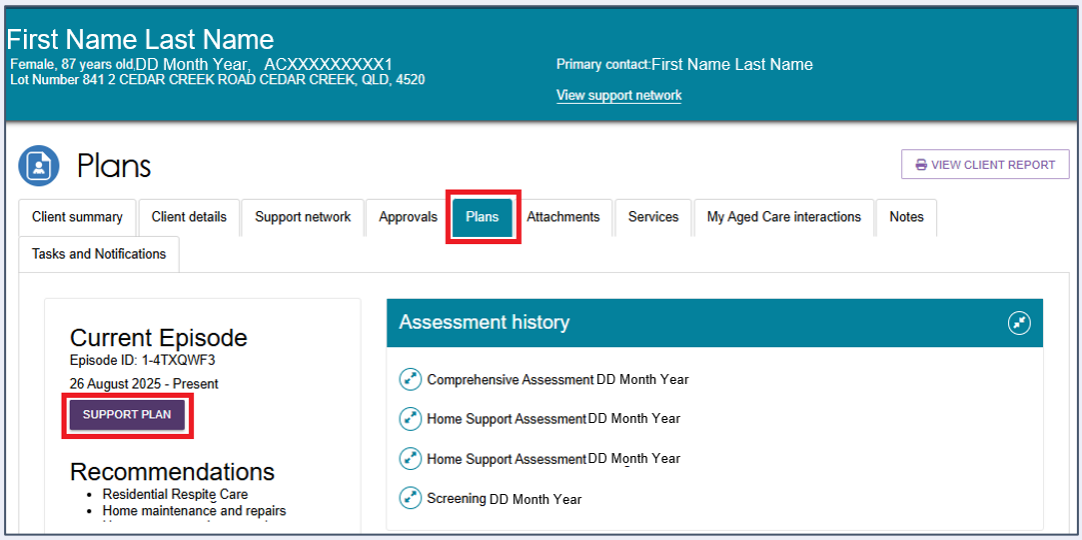


5. When the support plan is ready, download it through your browser and print it from your computer or device. The example below shows a support plan in the **Downloads** section of the Microsoft Edge browser.

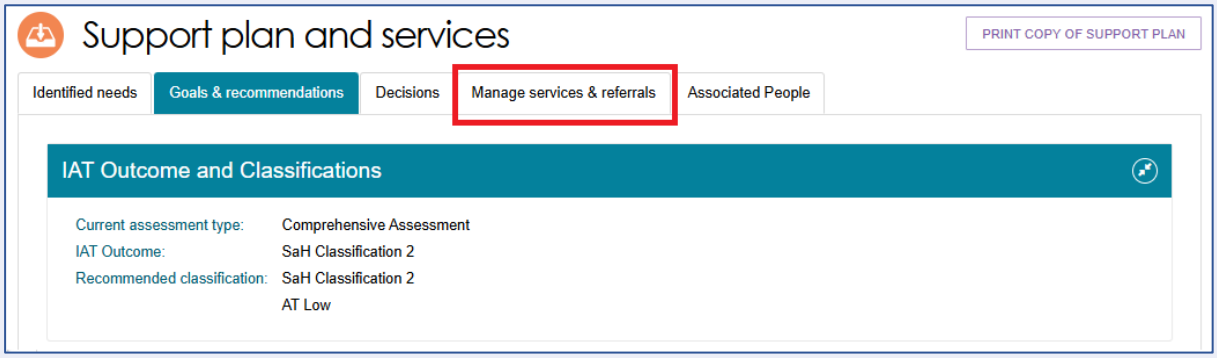


Generating referral code letters

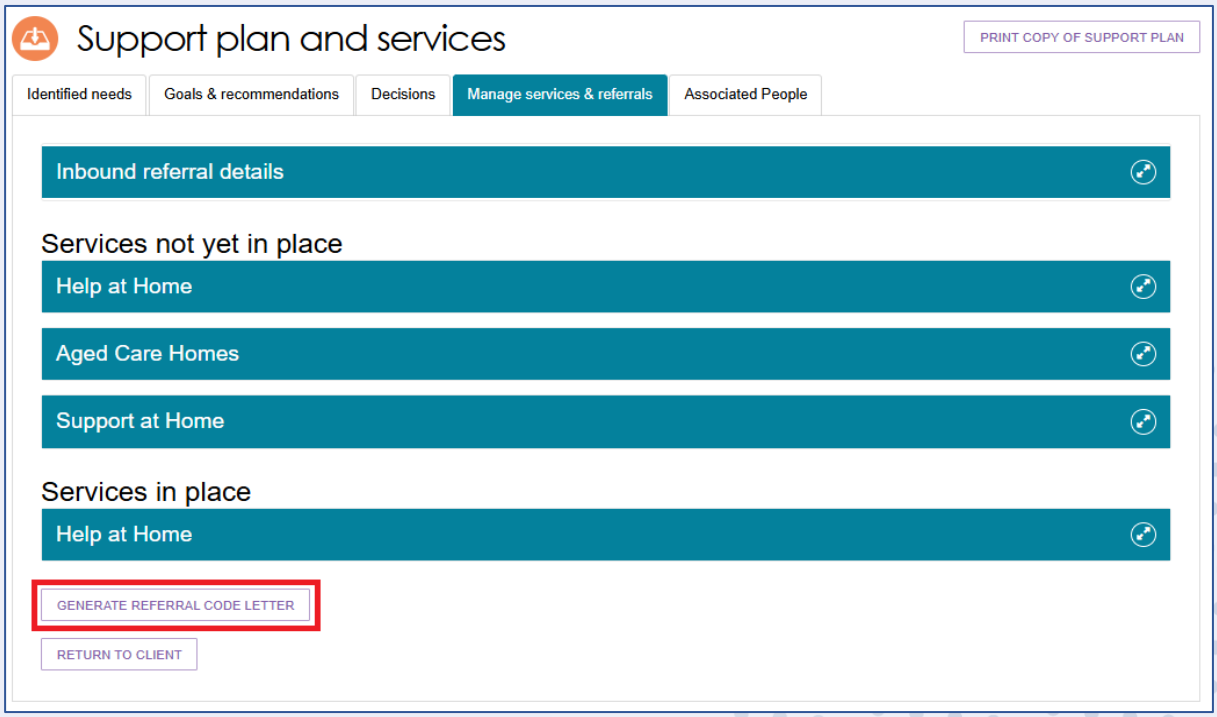
1. Open the client's record, select the **Plans** tab, and then select **Support Plan**.



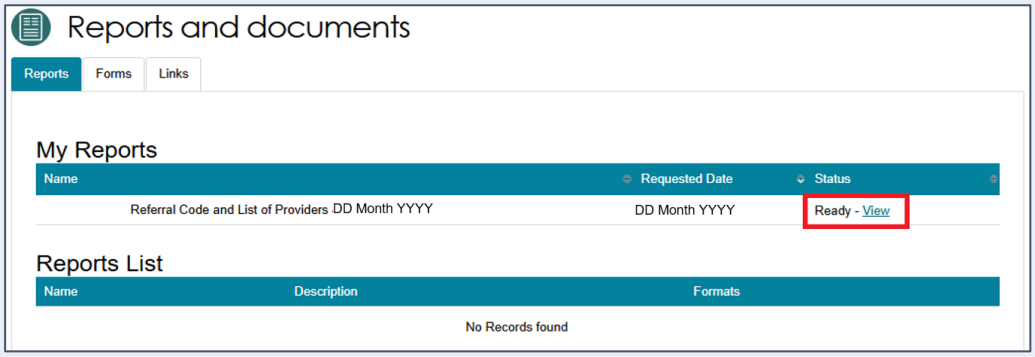
2. Select the **Manage services & referrals** tab. This page shows the client's service referrals and lets you generate a referral code letter.



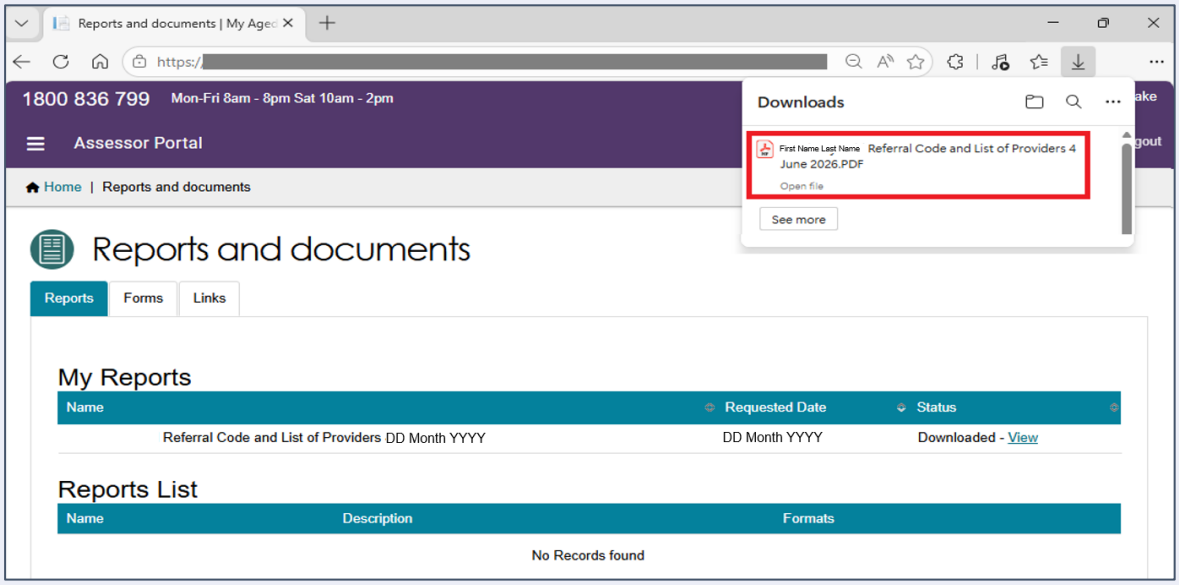
3. Select **GENERATE REFERRAL CODE LETTER** at the bottom of the page.



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



5. 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.



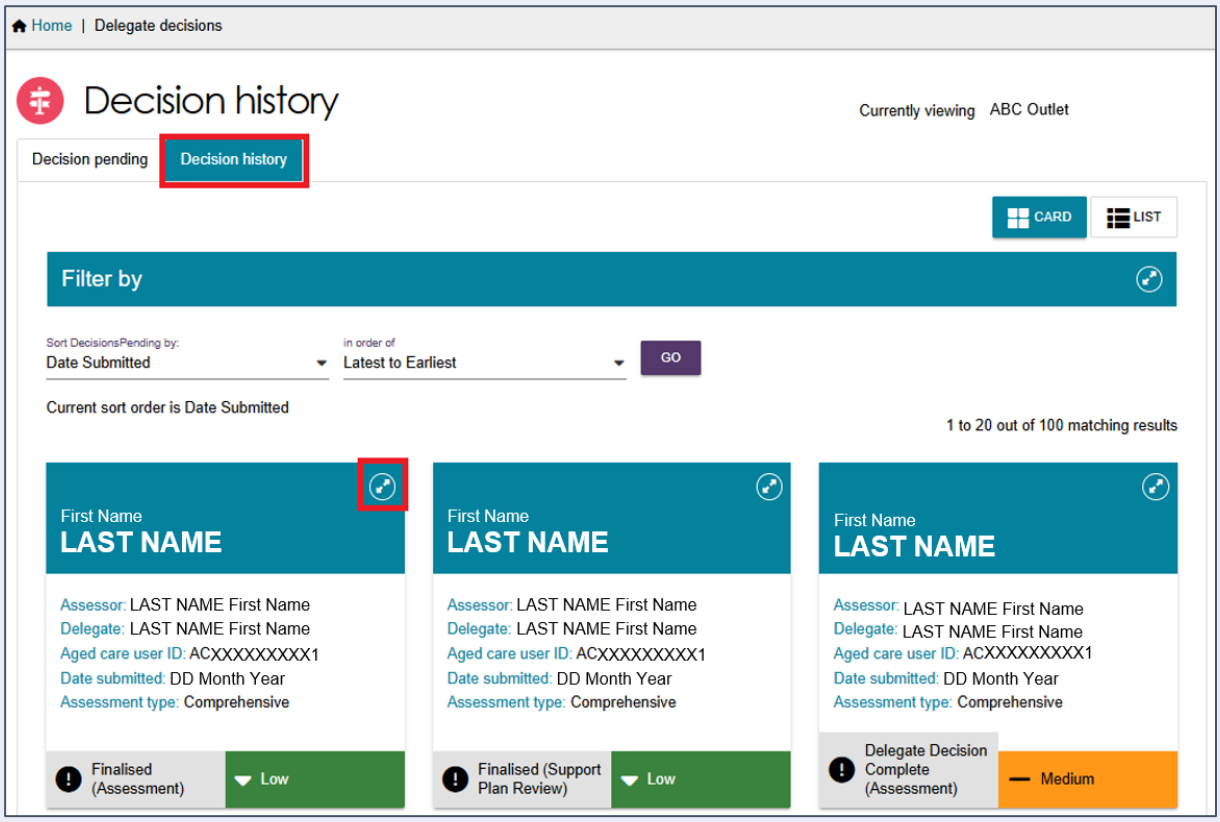
Notice of Decision Letters

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

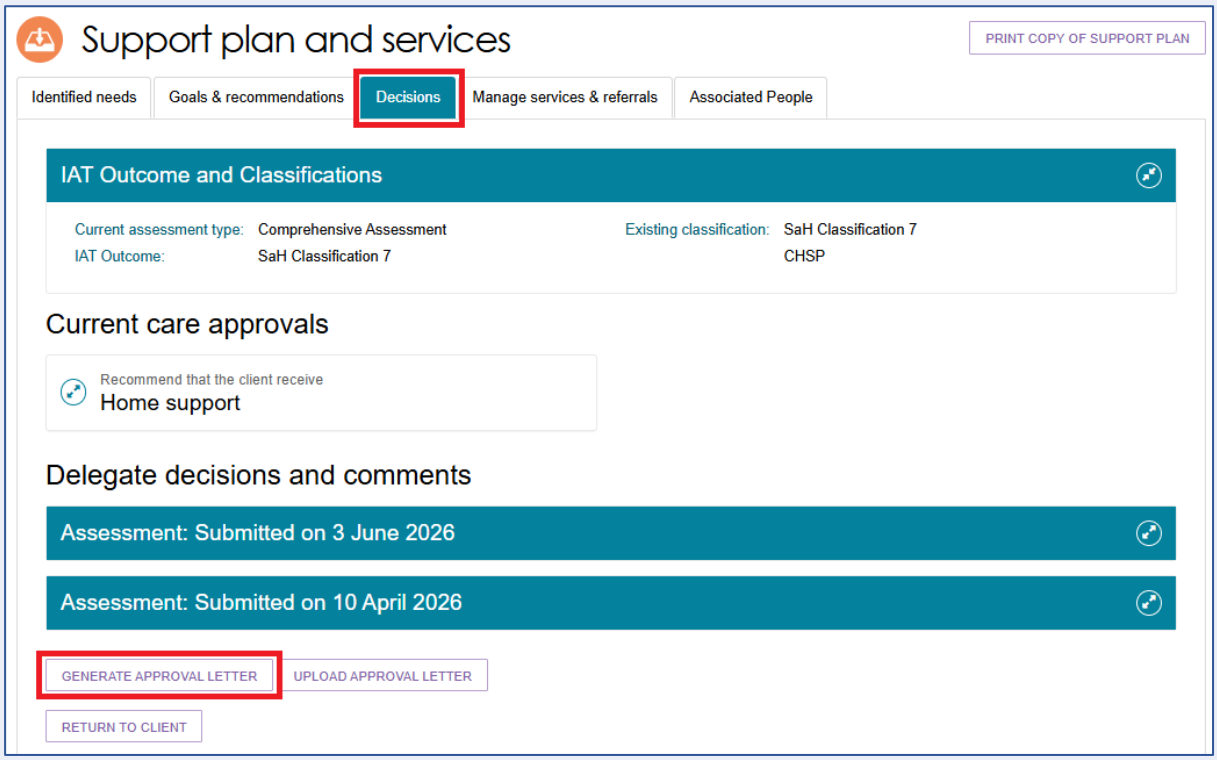
1. From the home page, select the **Delegate Decisions** tile. Then select the client from the client card or the list on the **Decision History** tab.



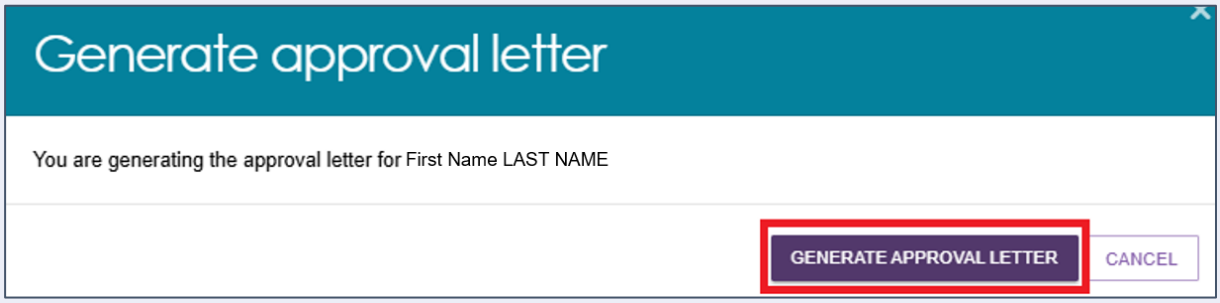
2. Select **VIEW SUPPORT PLAN.**

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

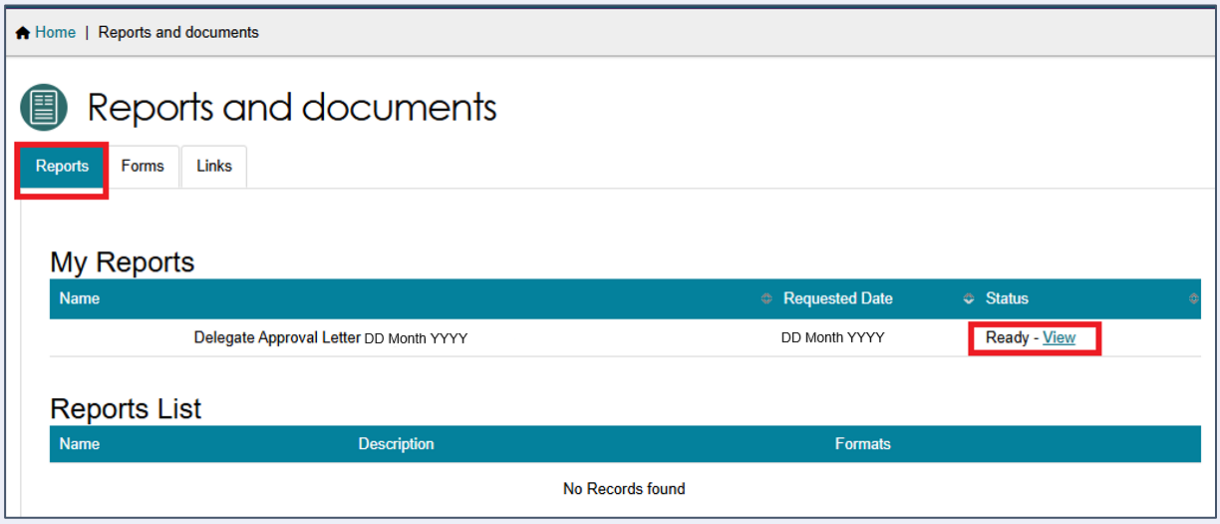
   Select **GENERATE APPROVAL LETTER** at the bottom of the page.



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

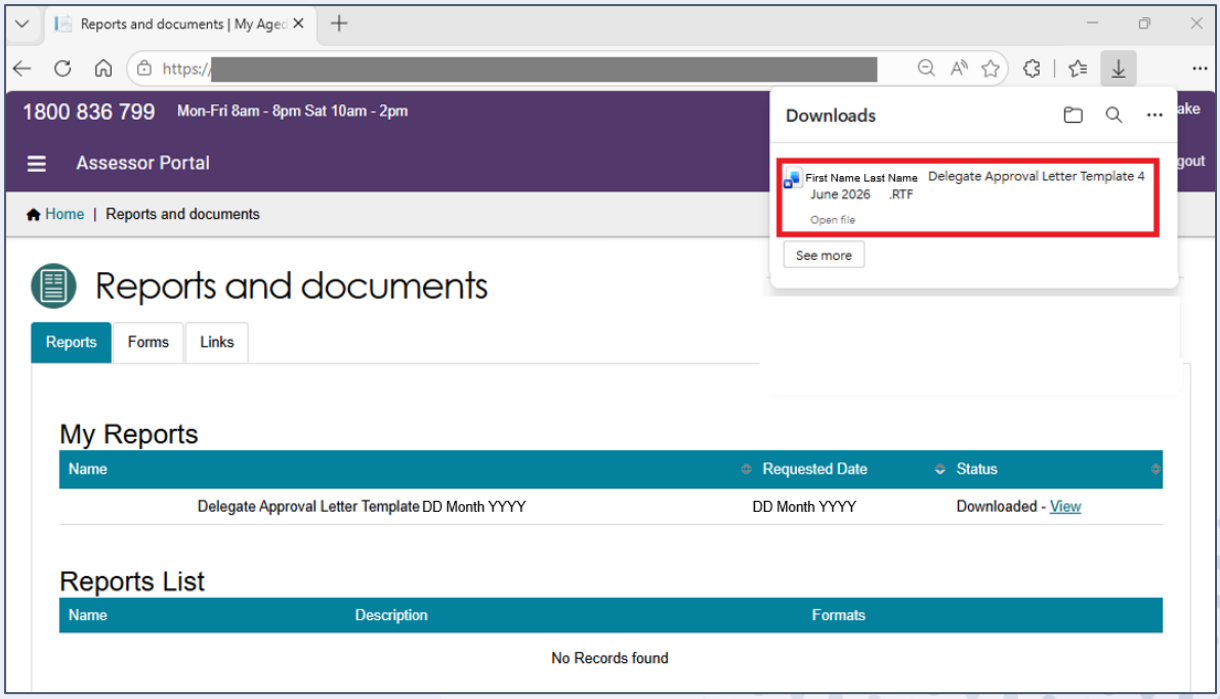


5. The letter appears in the **Reports and Documents** section of the portal with a status of **Processing**. When the letter is ready, the status changes and a **View** link appears. Open the letter using the **View** link.



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

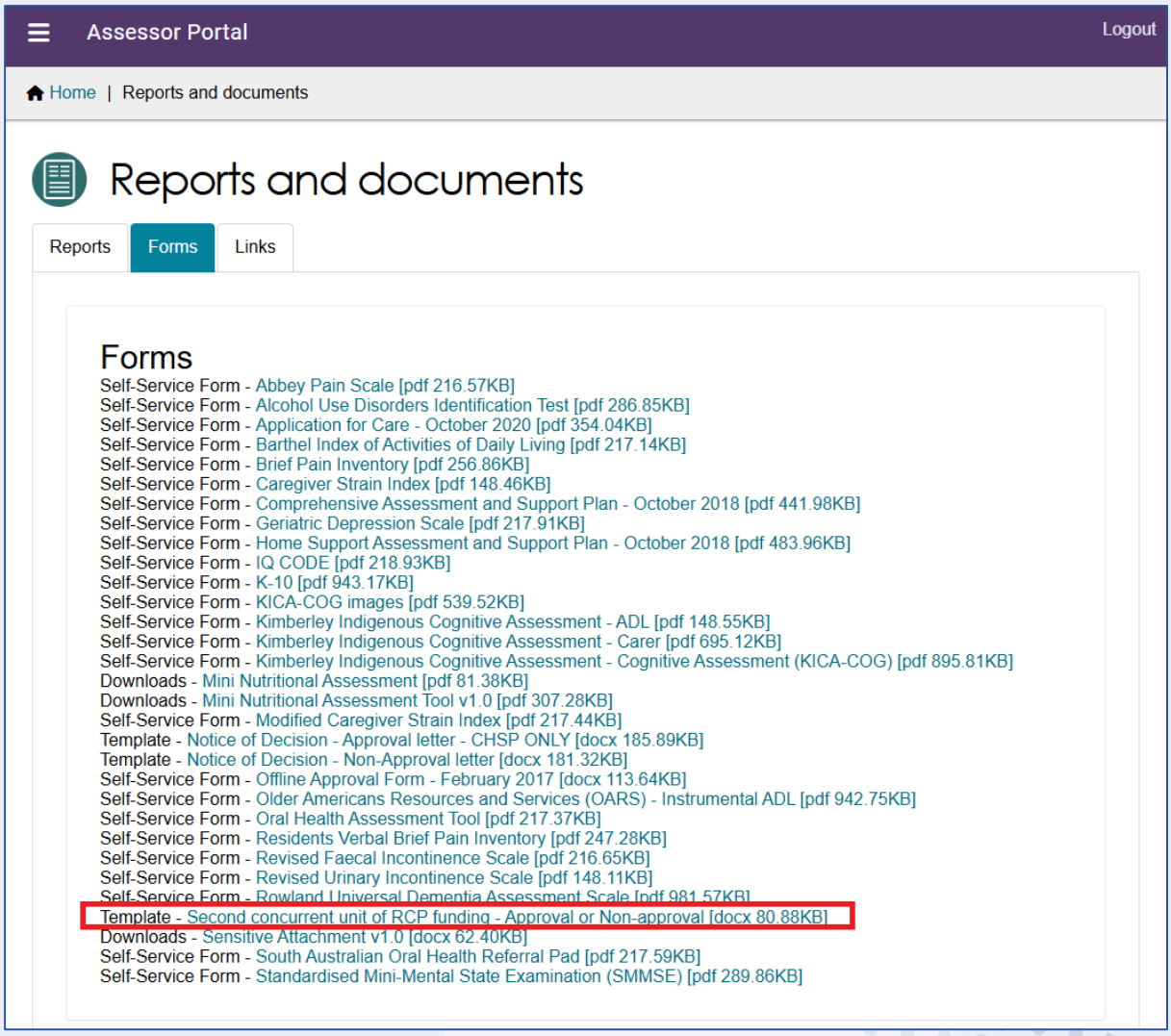
After the Assessment Delegate signs the letter, upload it to the client's record using the **Upload Approval Letter** button on the Decisions tab of the support plan.

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.

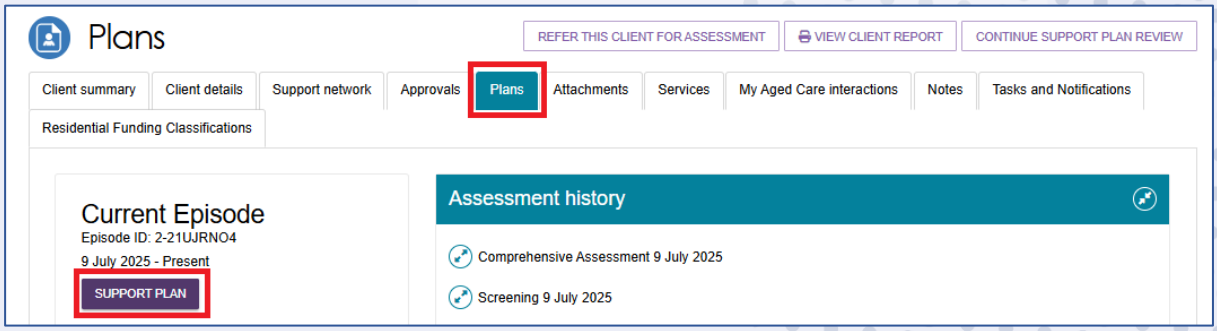
For **second-unit Restorative Care Pathway (RCP)** approval letters, complete the **Second Concurrent Unit of RCP Funding – Approval or Non-approval** template in the Reports and Documents section of the Assessor Portal. Once you complete the template, use **Upload Approval Letter** to upload the letter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

Second Concurrent Unit of RCP Funding letter template

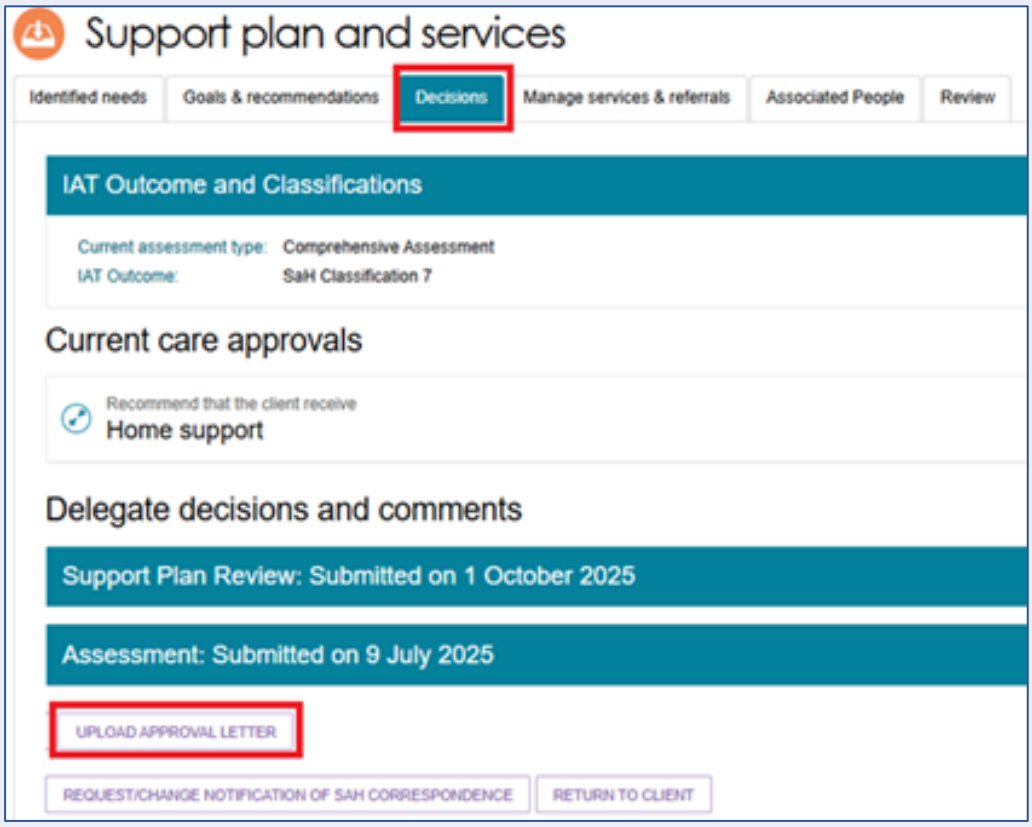


From the support plan

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



2. 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**.

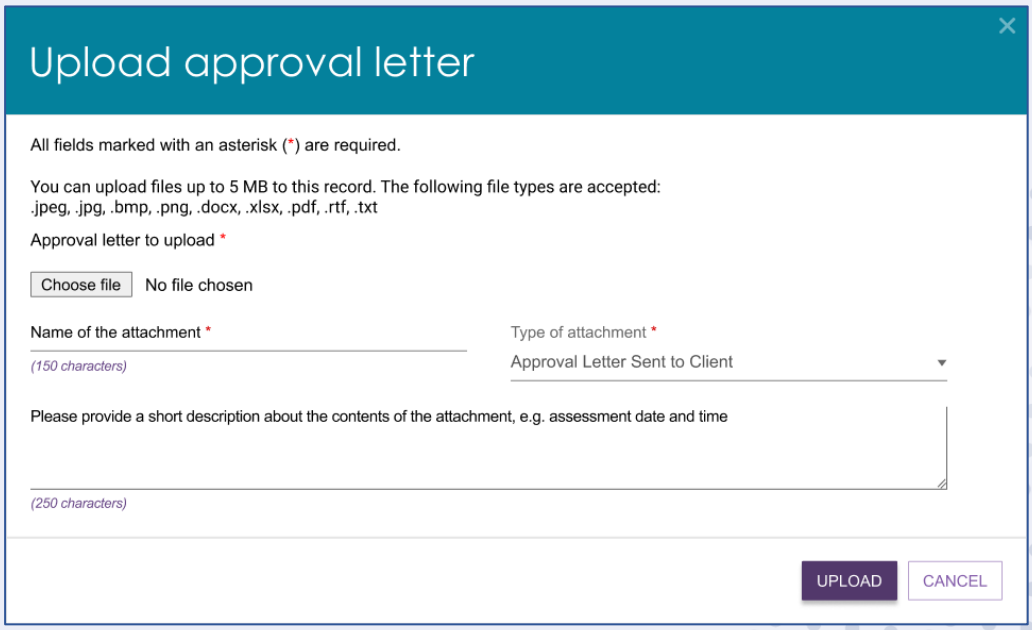


3. The **Upload Approval Letter** window opens. Select the approval letter file you want to upload.

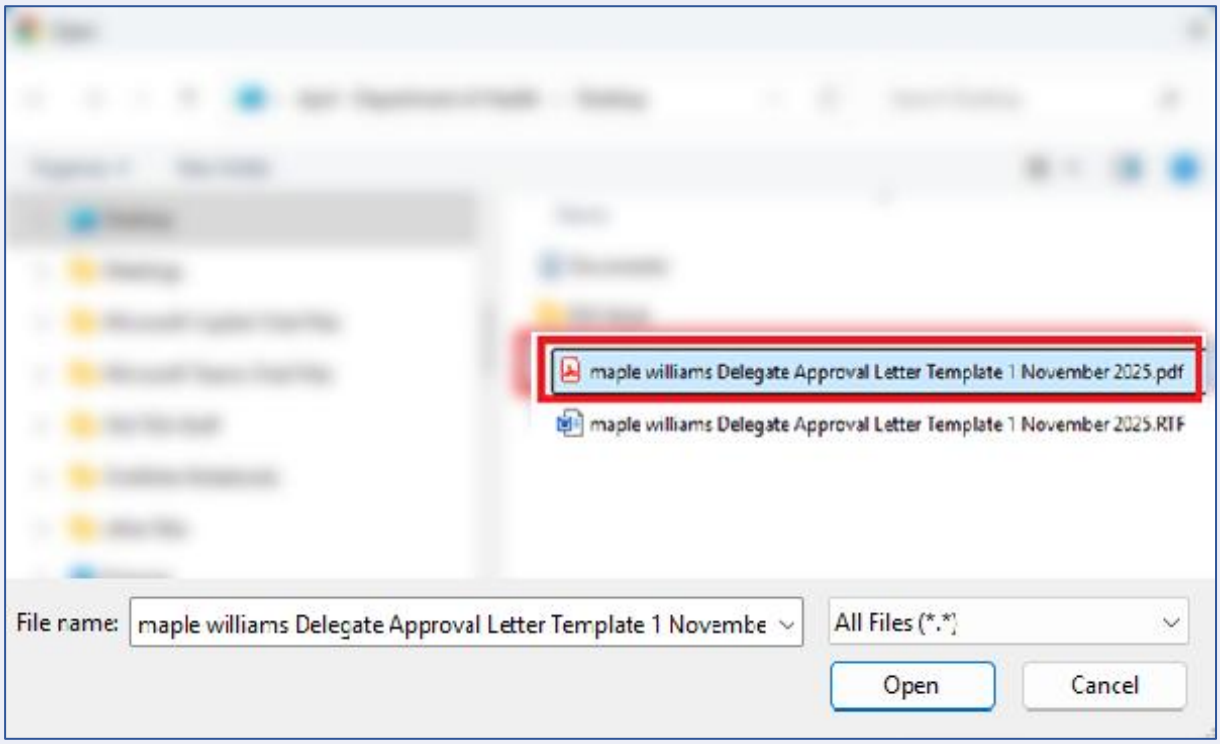
   Enter a name for the attachment. Make sure the **Attachment Type** is set to **Approval letter sent to client**.

   You can also enter a short description of the attachment.

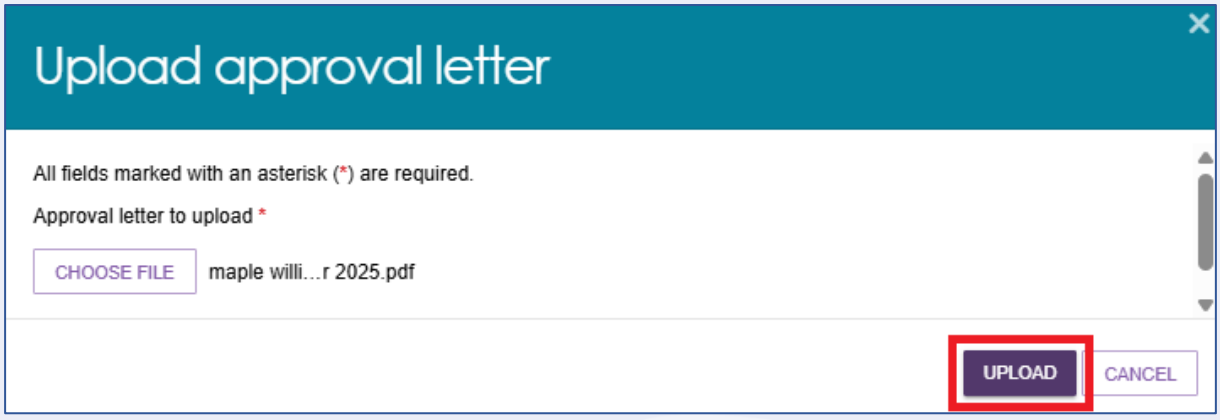
   Select **UPLOAD** to add the letter to the client's record.



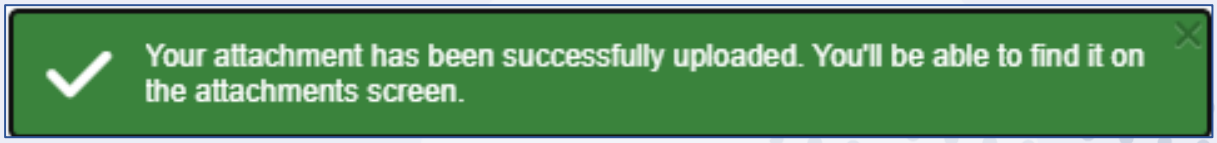
4. Choose the letter and then select **Open**.



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



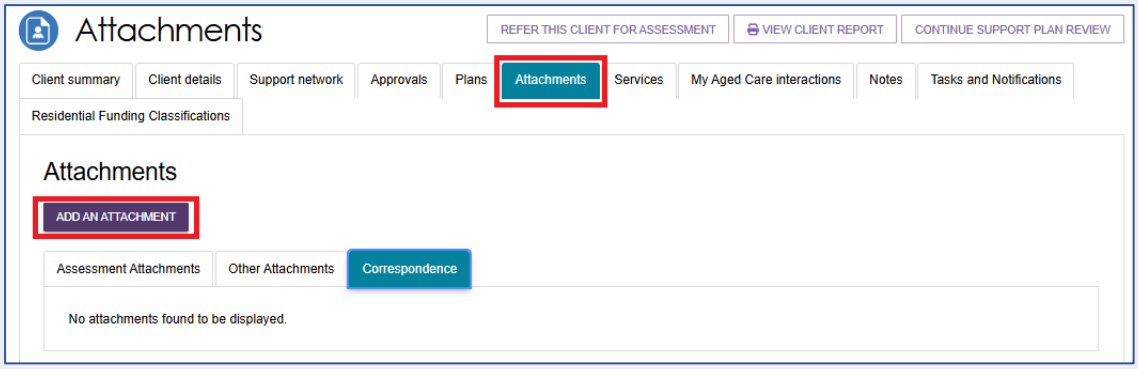
6. A confirmation message appears to let you know the upload was successful. You can now find the letter in the **Attachments** tab of the client's record.



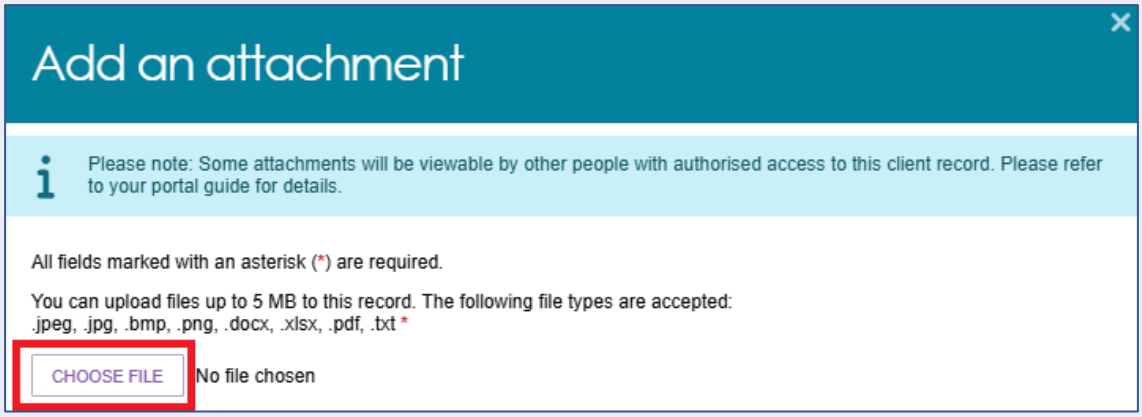
From the attachments tab

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

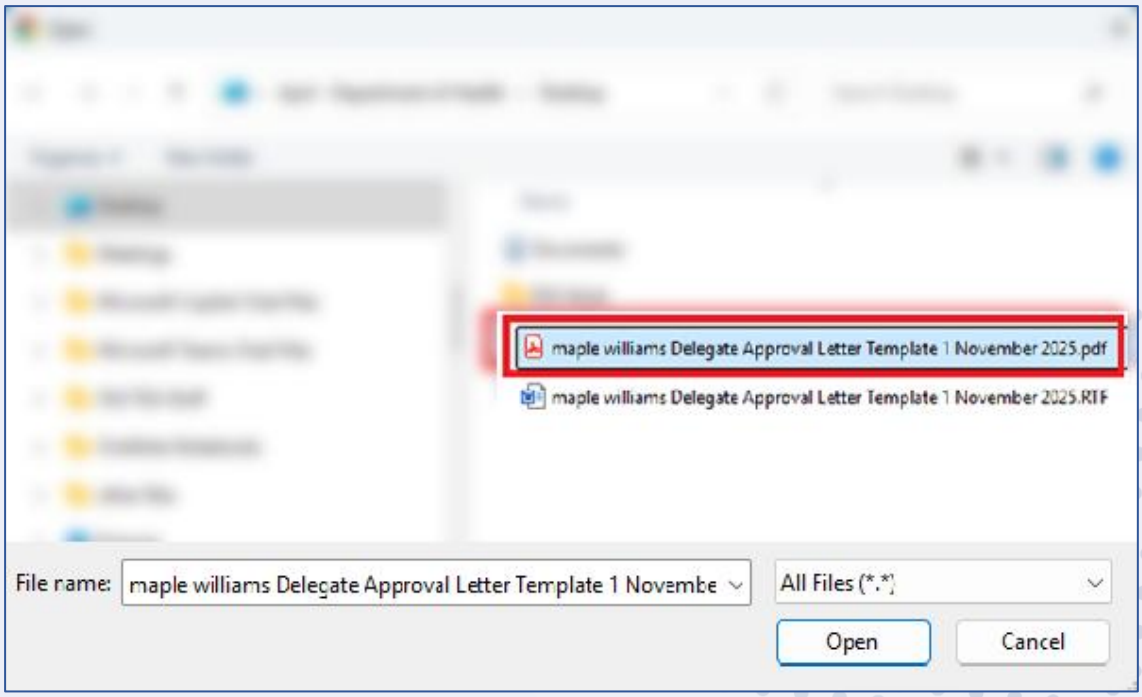
1. Open the client's record and select the **Attachments** tab. Then select **Add an Attachment**.



2. Select **Choose File**.



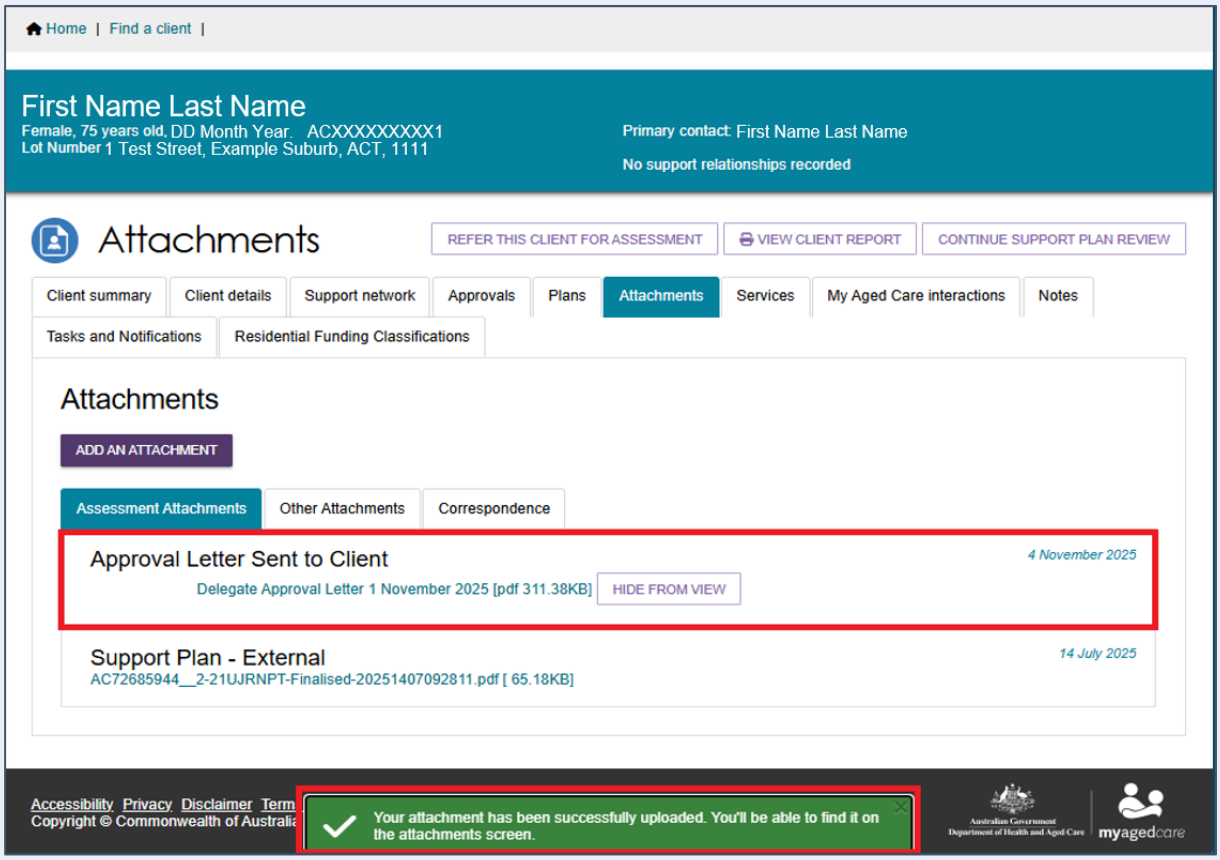
3. Select the approval letter and then select **Open.**



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.

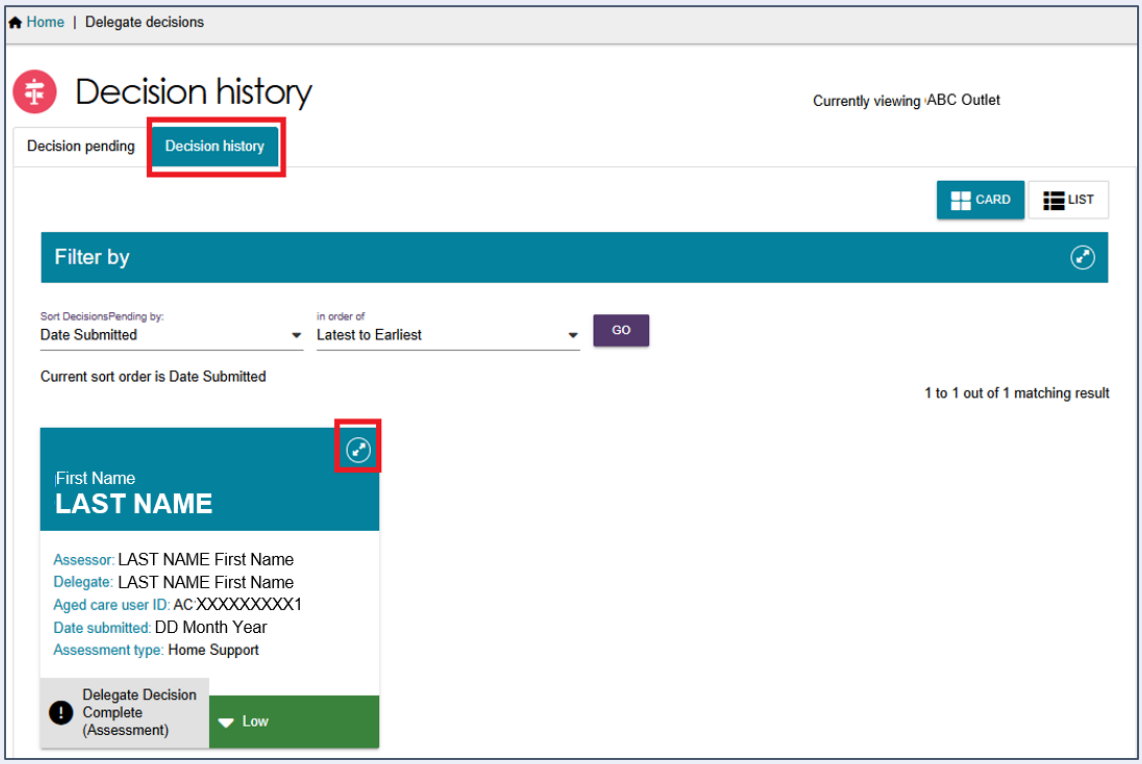
Select Upload.



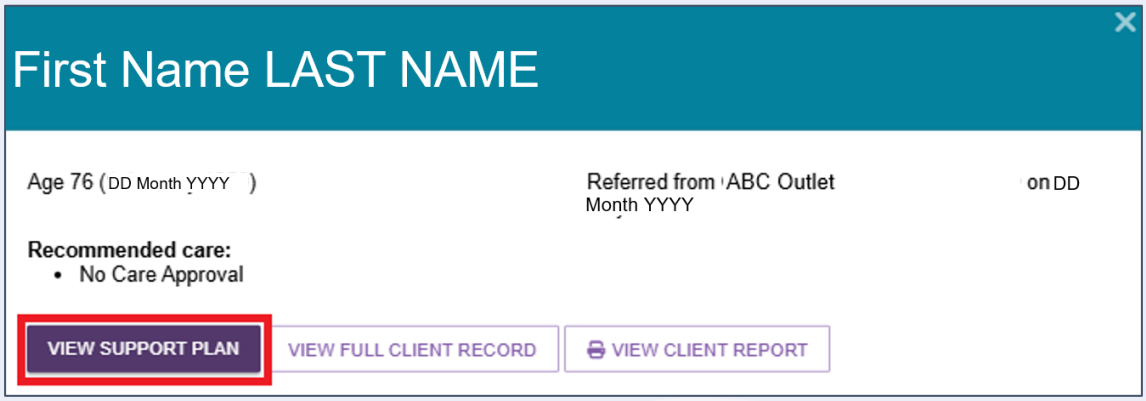
5. The letter now appears under the **Assessment Attachments** tab of the **Attachments** page.

Generating Non-Approval Letters

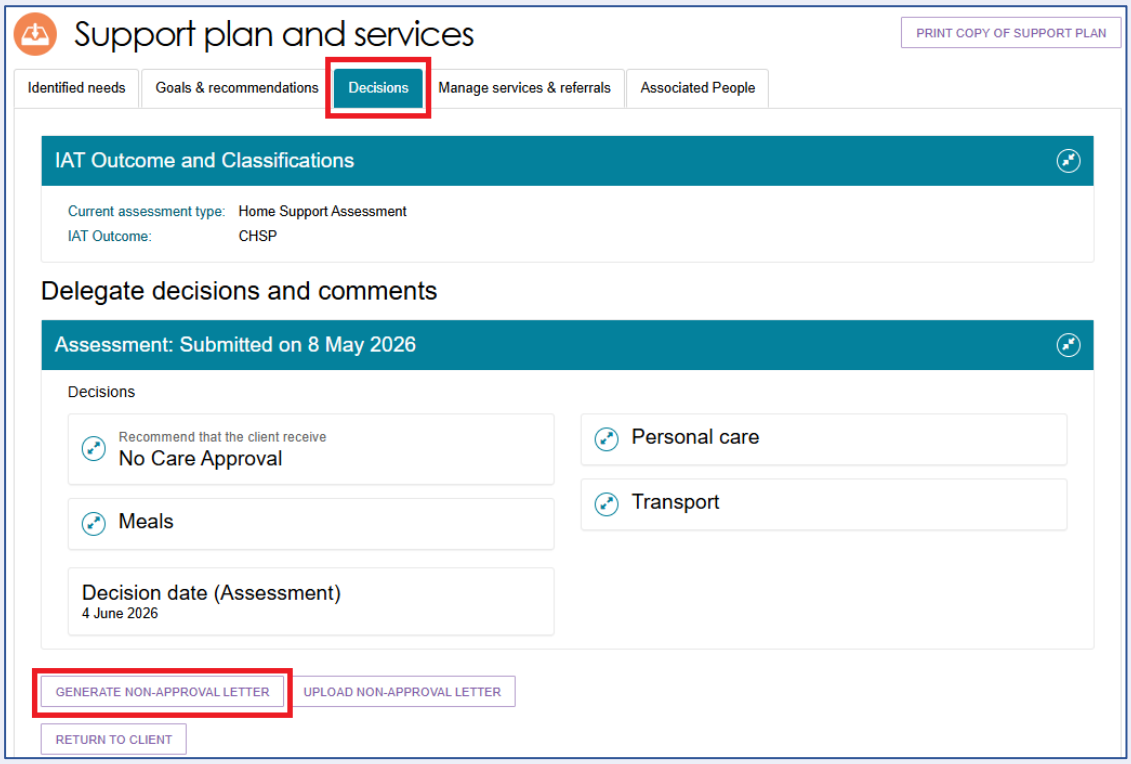
1. From the home page, select the **Delegate Decisions** tile. Then select the client from the client card or the list on the **Decision History** tab.



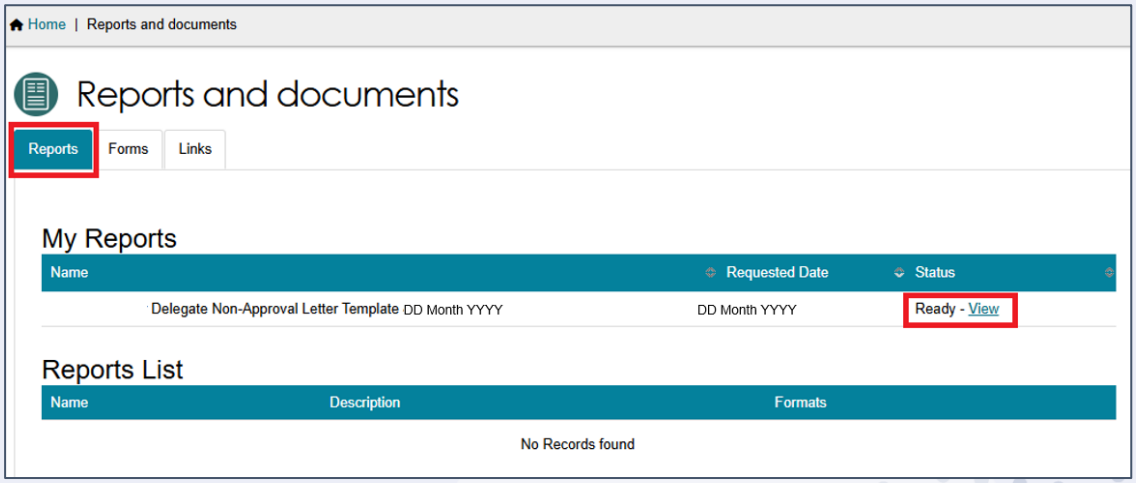
2. Select **VIEW SUPPORT PLAN**.



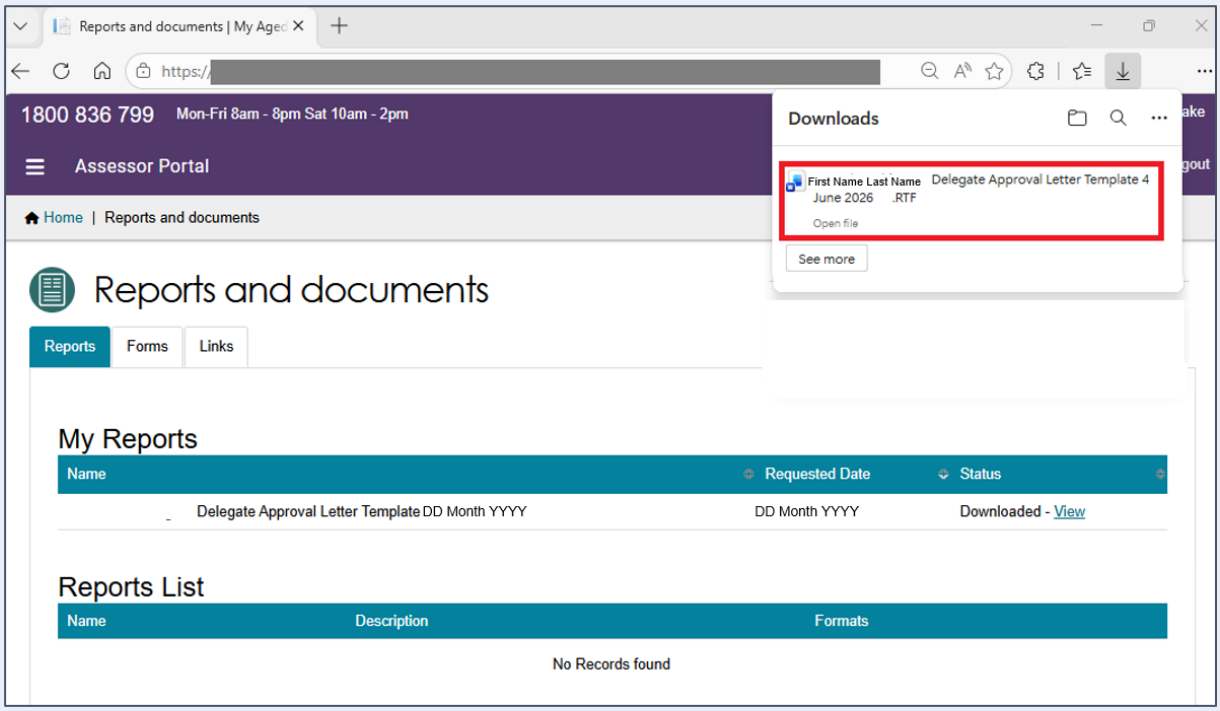
3. The client's **Decisions** tab on the **Support Plan and Services** page opens. Select **GENERATE NON-APPROVAL LETTER** at the bottom of the page.



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.



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**.

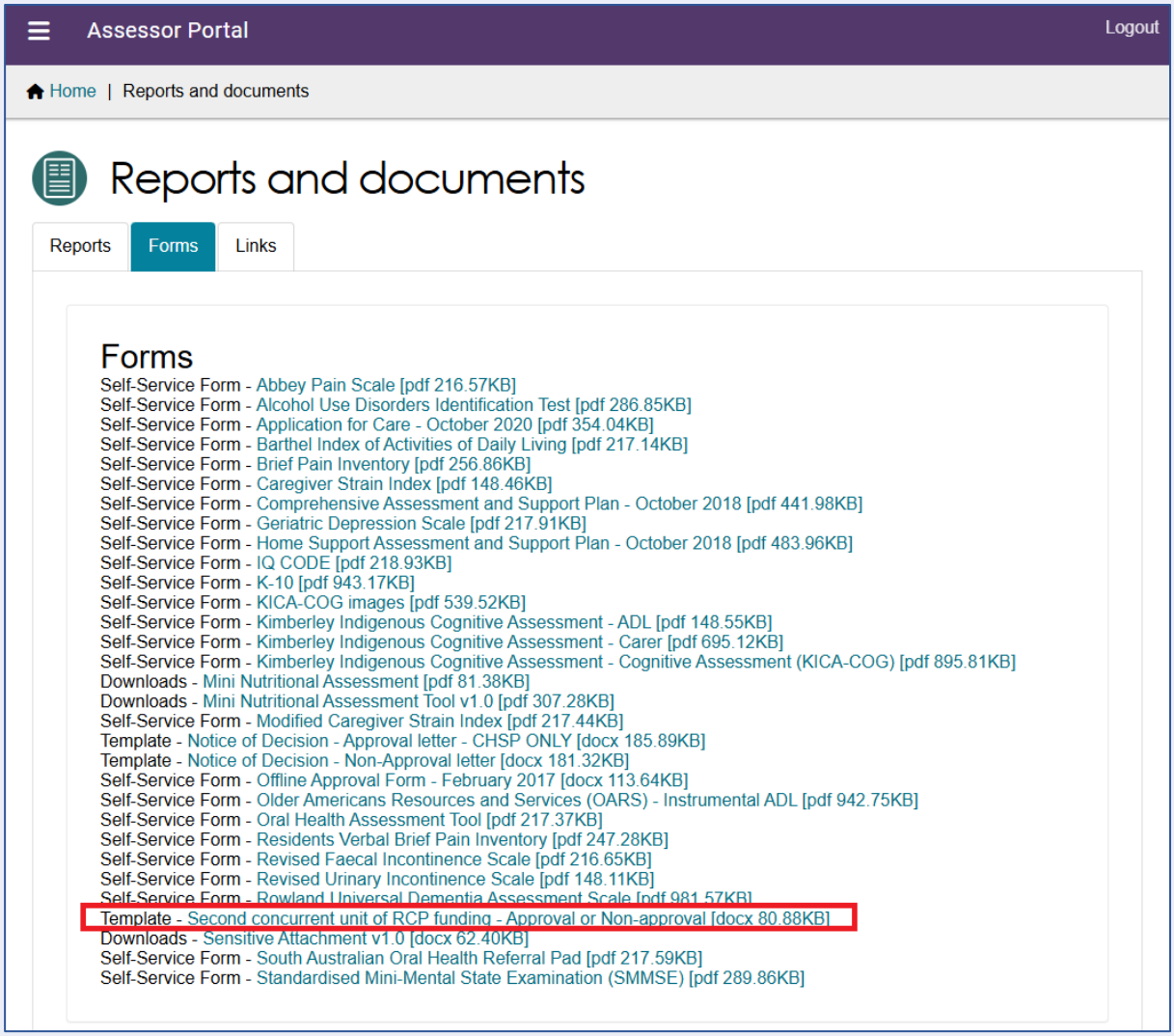
For **Comprehensive Assessments**, the **Upload Non-Approval Letter** option is only available for **No Care Approval** decisions and similar outcomes.

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.

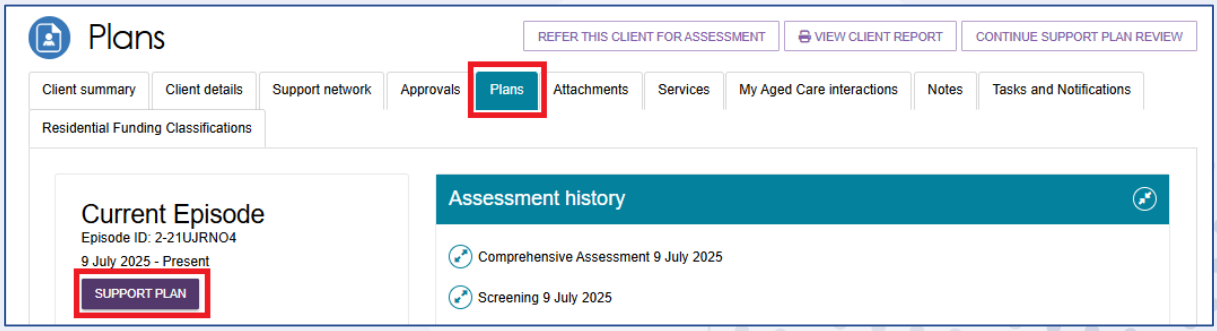
Once you complete the template, use **Upload Non-Approval Letter** to upload the letter to the client's record.

Second Concurrent Unit of RCP Funding letter template

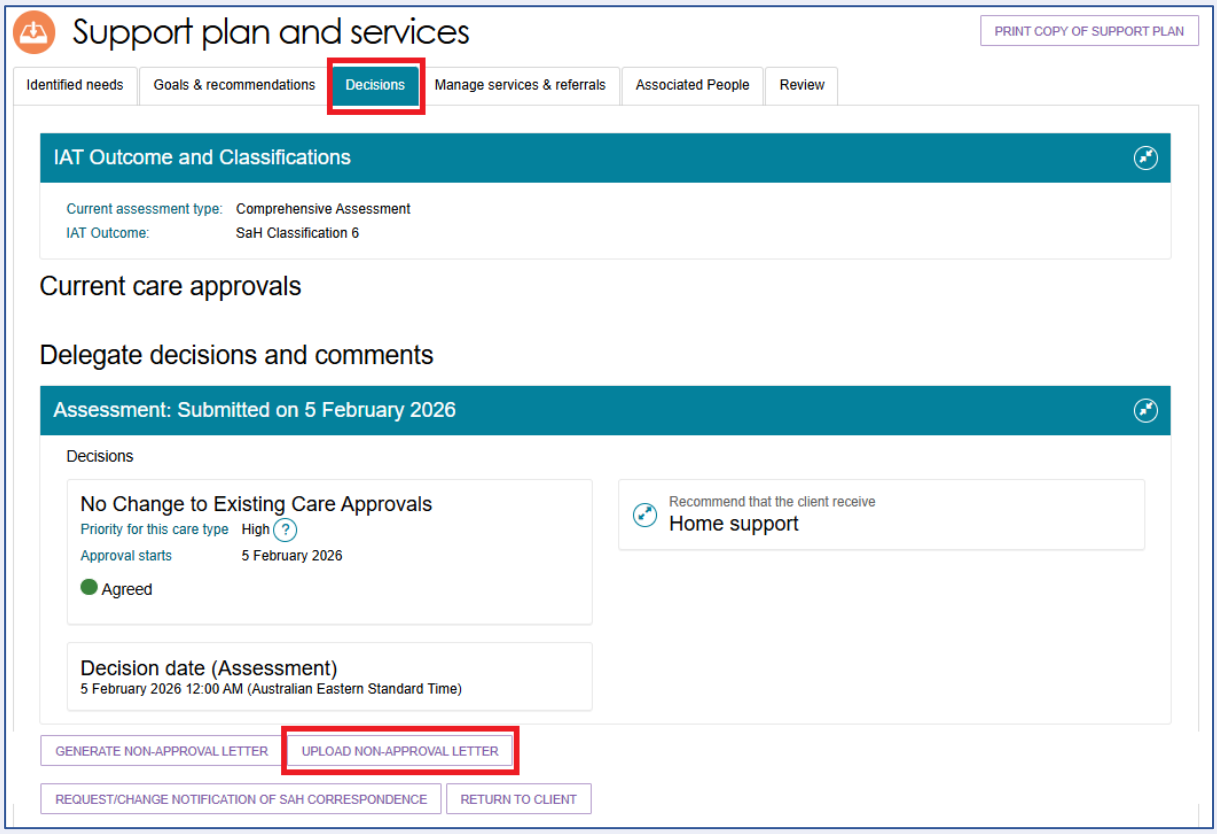


From the support plan

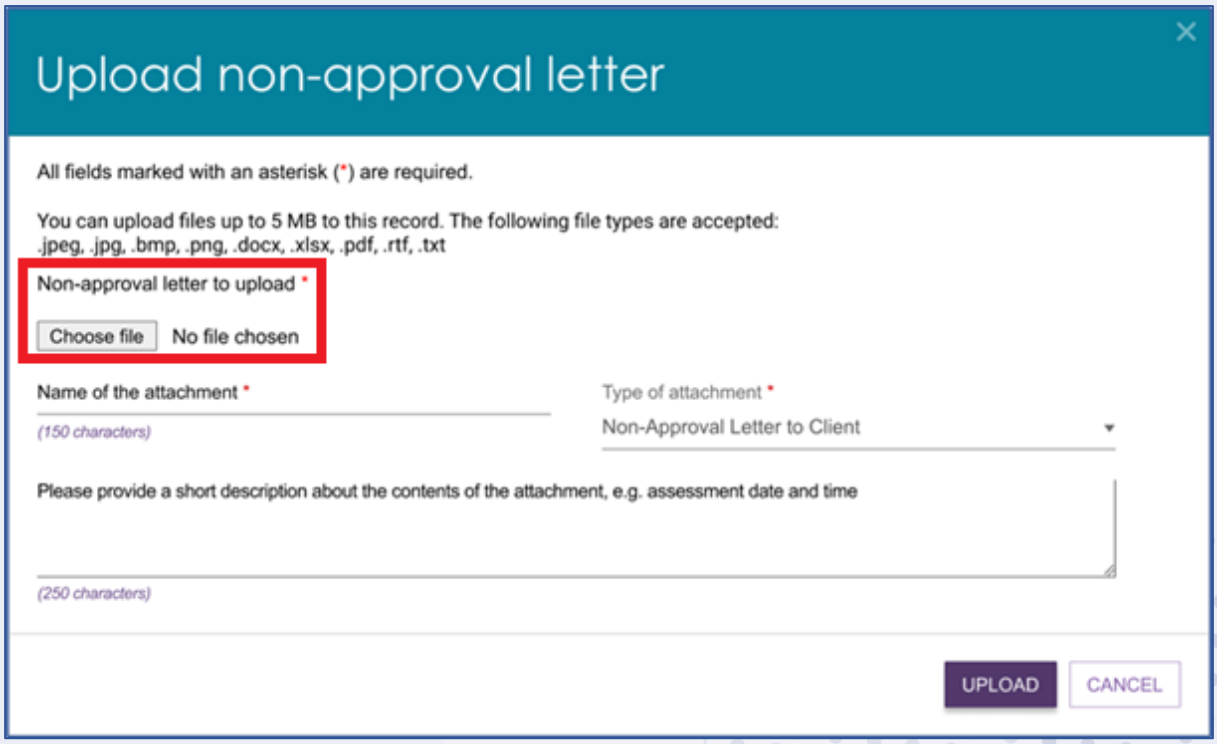
1. Open the client's record and select the **Plans** tab. On the **Plans** page, select **Support Plan**.



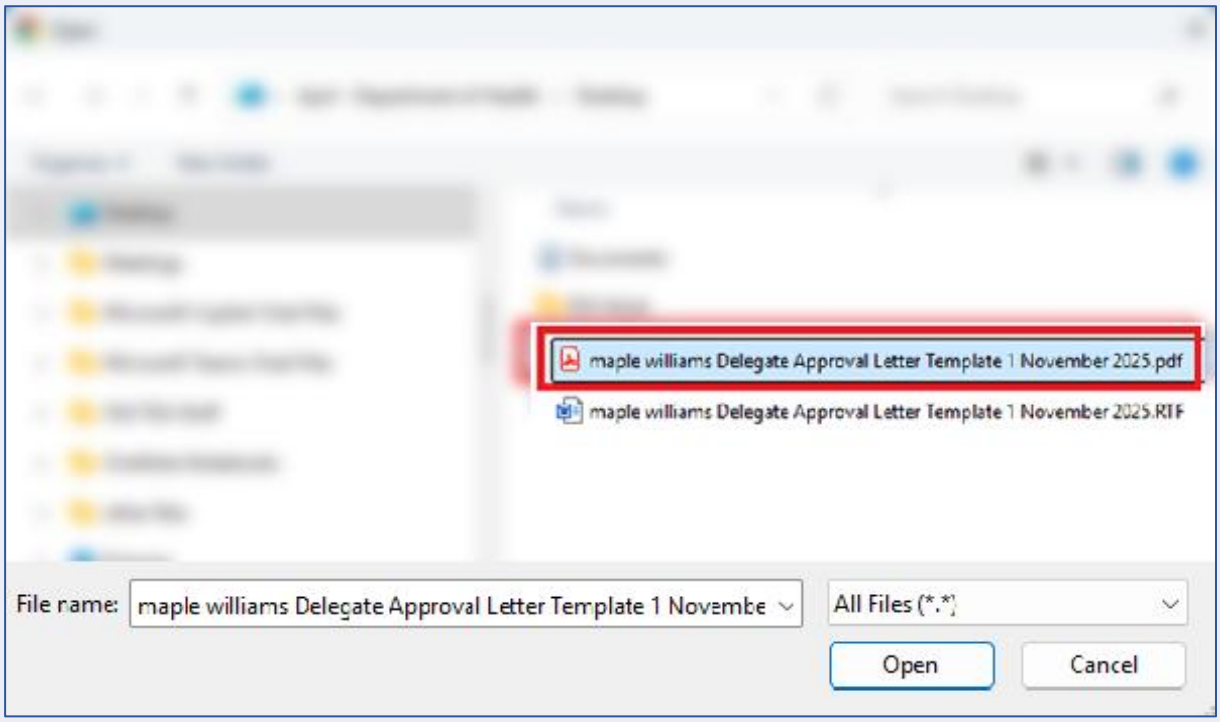
2. The **Support Plan and Services** page opens. Select the **Decisions** tab, then select **Upload Non-Approval Letter** at the bottom of the page under **Delegate decisions and comments**.



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



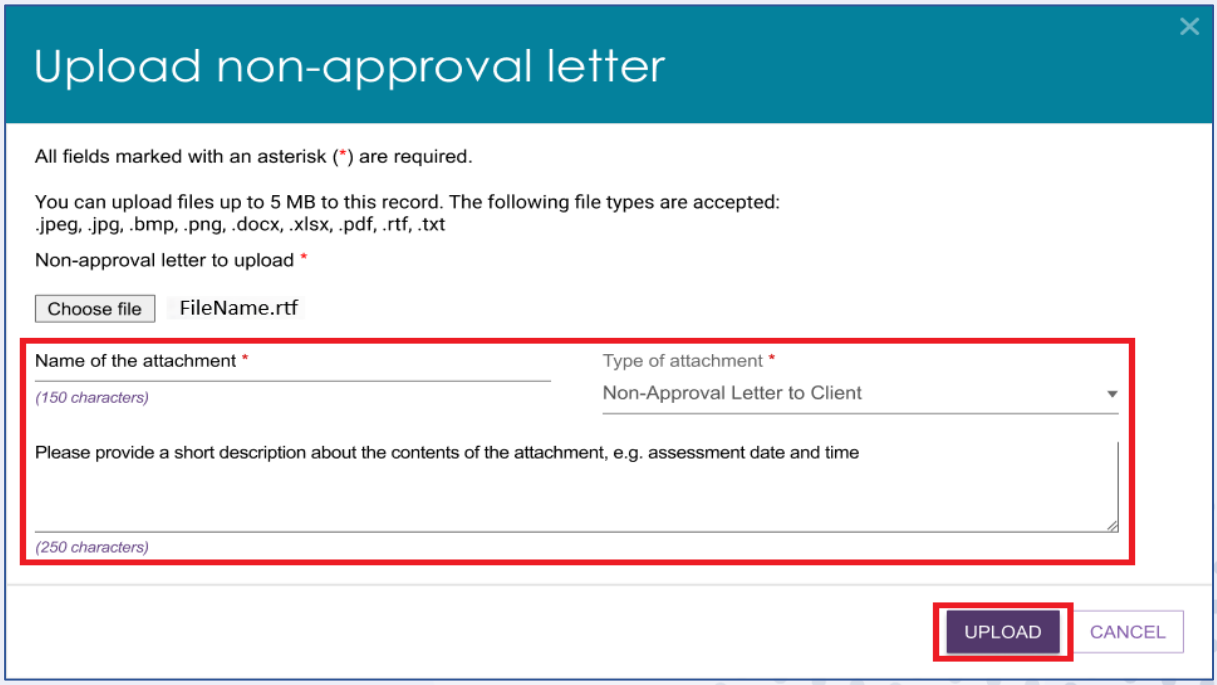
4. Select the letter you want to upload, then select **Open**.



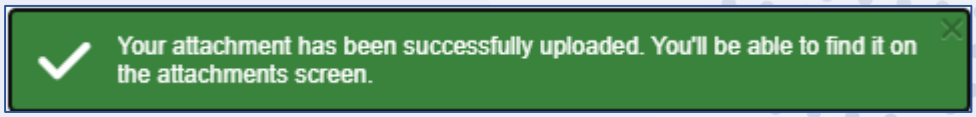
5. The file name appears next to the **Choose File** button. Enter a name for the letter and make sure the **Attachment Type** is set to **Non-Approval Letter to Client**.

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

   Select **UPLOAD**.



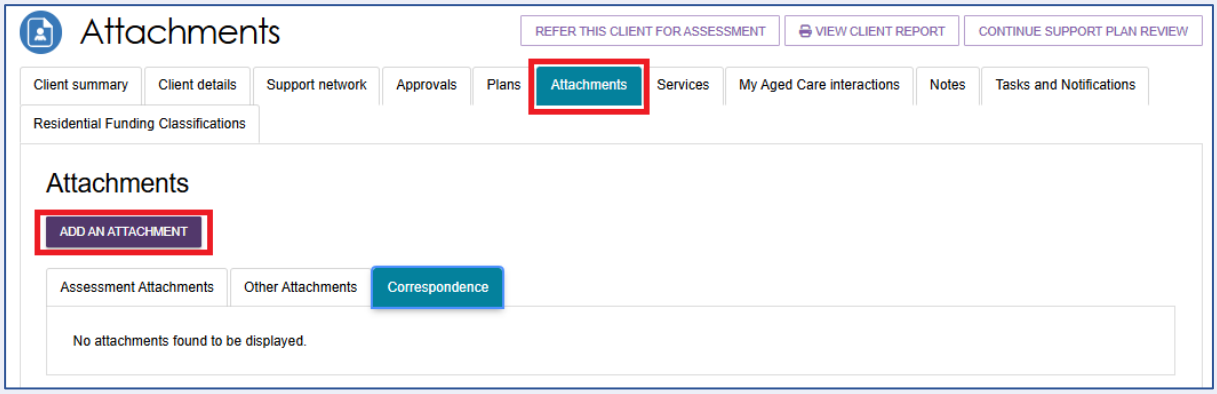
6. A confirmation message appears to let you know the upload was successful. You can now find the letter in the **Attachments** tab of the client's record.



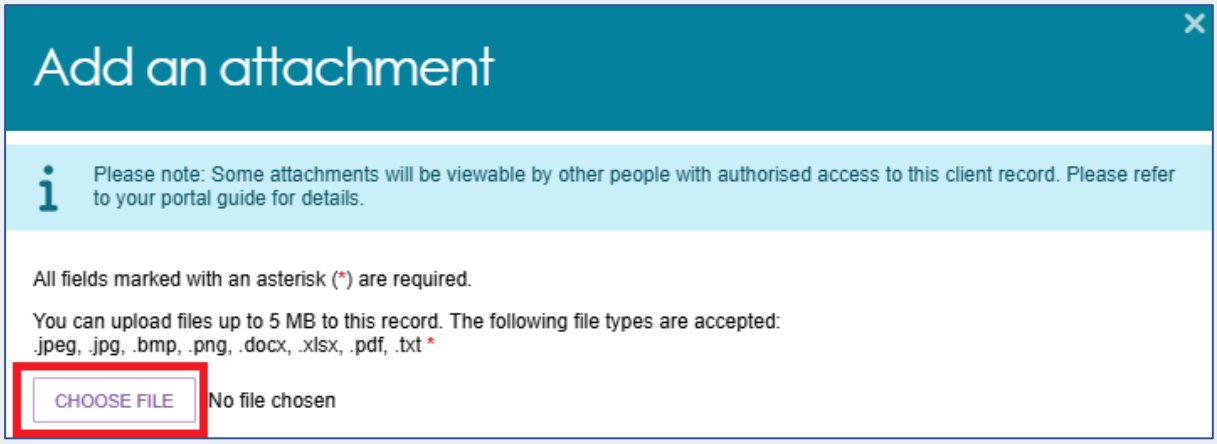
From the attachments tab

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

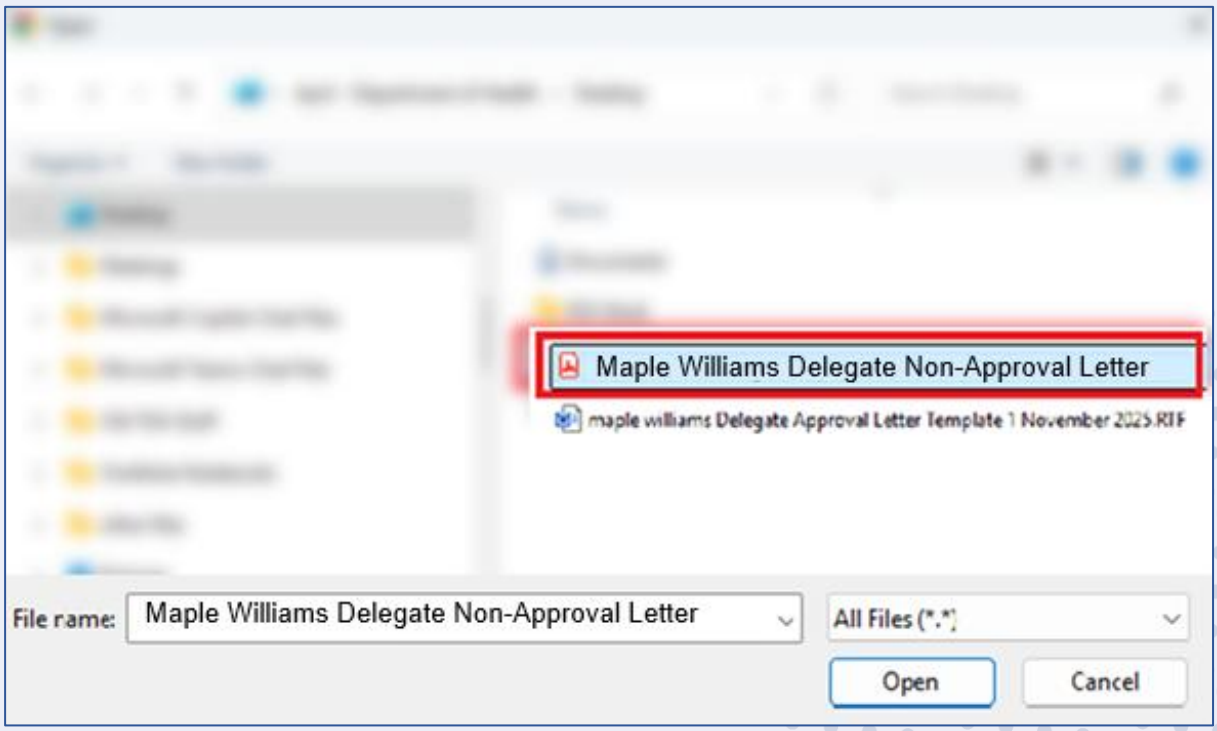
1. Open the client's record and select the **Attachments** tab. Then select **Add an Attachment**.



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



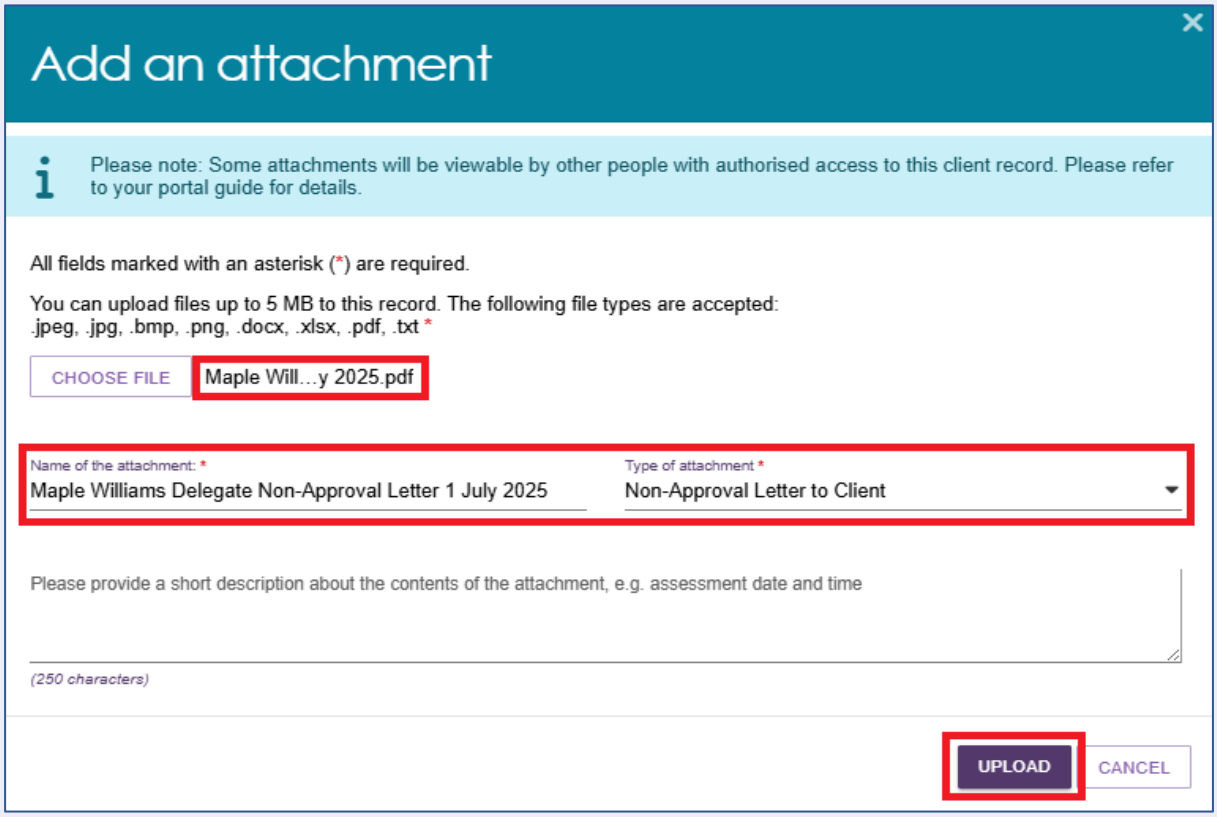
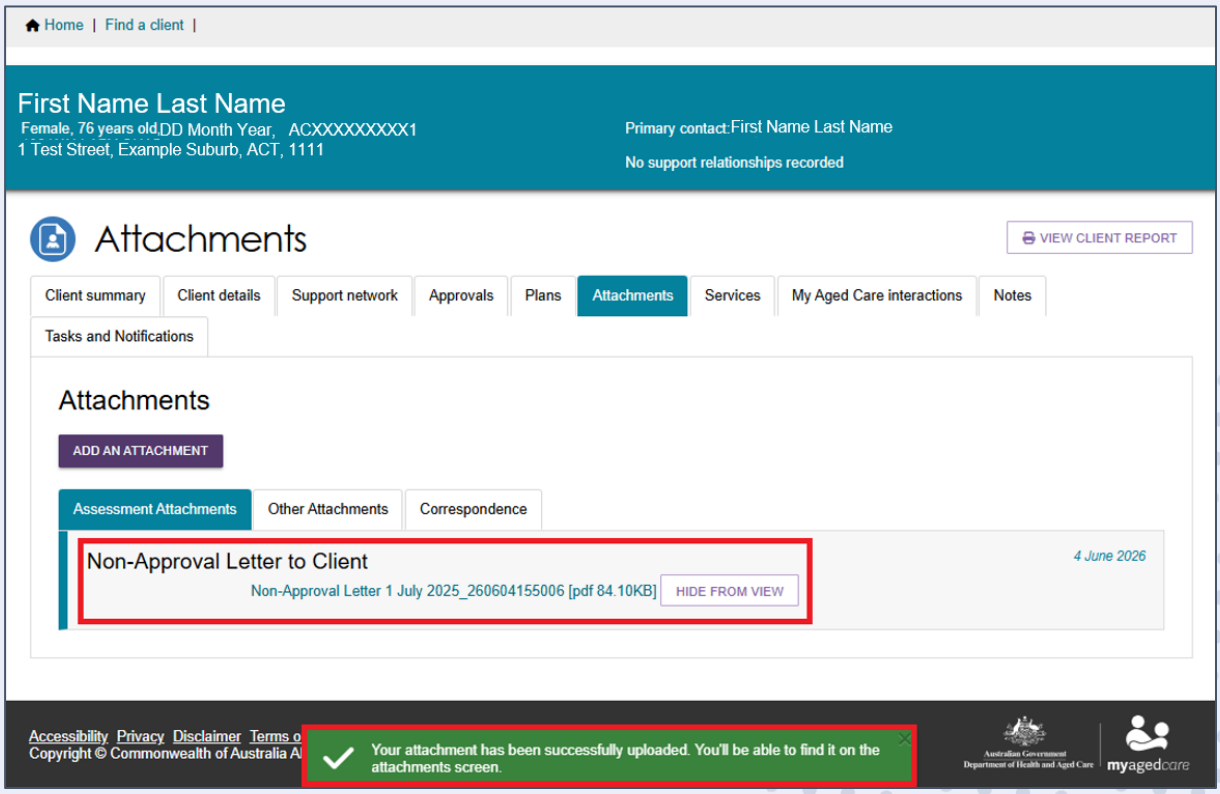
3. Select the non-approval letter you want to upload, then select **Open**.



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**.



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