

Assessor Portal User Guide 3 - Managing referrals for assessment and Support Plan Reviews

Referrals for assessment from My Aged Care are managed by the person(s) assigned the Team Leader or Triage Delegate role in the My Aged Care assessor portal (assessor portal).

This guide is intended to help staff manage assessment referrals as well as distinguish what functions sit within each role.

Team leaders can accept or reject assessment referrals. After accepting an assessment referral Triage Delegates can assign and complete triage. If the client is found to be ineligible for an assessment the Triage Delegate is required to record and send an Ineligible for Assessment letter to the client.

If the client is eligible for assessment, the Triage Delegates and Team Leaders can assign the referral to an aged care needs assessor (assessor). Team Leaders can reassign or unassign the triaged referrals as required.

Team leaders can also transfer incoming and accepted (but not yet commenced) referrals to other assessment organisations. Before accepting referrals, team leaders can change the priority of assessment referrals.

! On 1 November 2025, the *Aged Care Act 2024* and the Support at Home program came into effect with changes to the functionality of support plans in the IAT.

To ensure the right IAT is used, and triage can continue for priority referrals, any assessments in the following statuses already started prior to 1 November 2025 and in progress on 1 November 2025 must be restarted:

- Triage complete, main assessment not started
- Triage complete, main assessment in progress (includes incomplete support plan)
- Main assessment completed, awaiting delegate decision (comprehensive assessments)

For information on the **Restart Assessment Process**, please refer to *Management of active assessments for 1 November 2025 transition - Standard Operating Procedure* and *Restarting In Progress Assessments for Support at Home* (instructional video).

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Team Leader and Triage Delegate functions

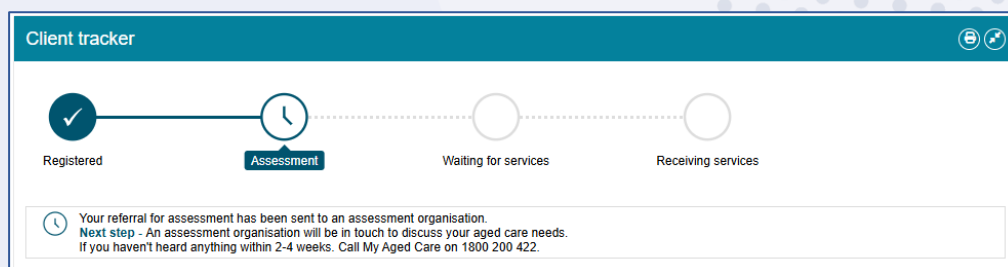
This guide will provide guidance for various functions that both Triage Delegates and Team Leaders can perform, please refer to the table below for specific functions:

Function	Team Leader	Triage Delegate
View client's Client Journey Tracker	✓	✓
Viewing incoming, accepted and assigned assessment referrals (including those flagged as Urgent services)	✓	
Viewing triaged assessment referrals	✓	✓
Accept an incoming assessment referral	✓	
Reject or transfer an incoming, accepted or triaged assessment referral	✓	
Assign an accepted assessment referral to myself (if a triage delegate) or another triage delegate for triage		✓
Complete triage (if applicable generate and upload Ineligibility Letter)		✓
Reassign an accepted assessment referral or an assessment while triage is in progress		✓
Refer a client for urgent services before starting triage and once triage is completed		✓
Convert the assessment between Home Support and Comprehensive		✓
Assign an assessment to an assessor once triage is completed	✓	✓
Reassign or unassign triaged assessment referrals.	✓	

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.

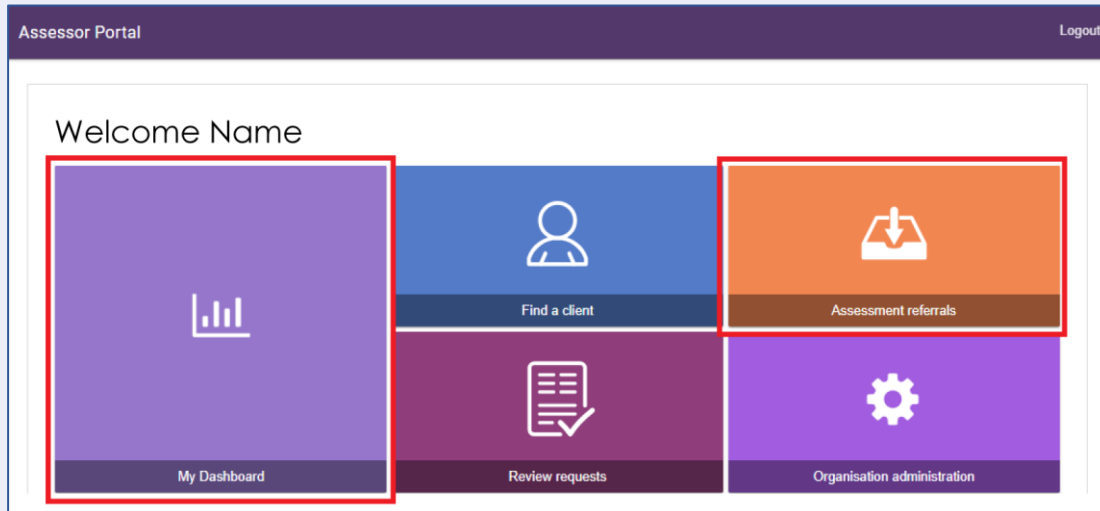
The example below shows what the Client Journey Tracker looks like after an assessment organisation has accepted an assessment referral. The client's next step is: 'an assessment organisation will be in touch to confirm your eligibility for assessment and the type of assessment you need.'



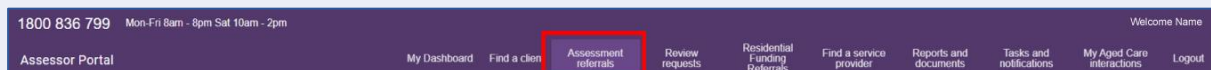
Viewing incoming assessment referrals and client information

Team Leaders can follow the steps below to view incoming referrals for clients assigned to the outlet.

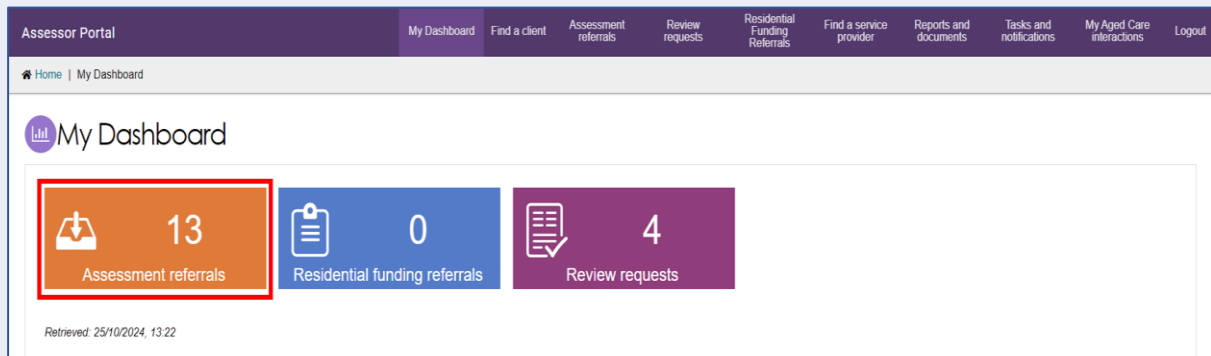
1. Select **My Dashboard** from the home page. You can also select **Assessment referrals** on the homepage.



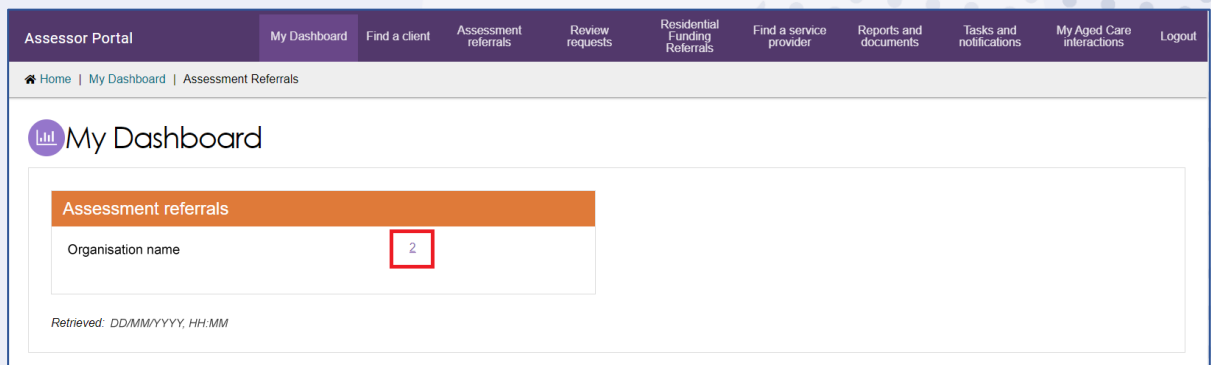
2. Alternatively, select **Assessment referrals** from the tool bar at the top right-hand corner of the portal.



3. Select the **Assessment referrals** in the **My Dashboard** page.



4. You can view referrals depending on your assigned role. Select the hyperlink corresponding to the referral origin to view more details.



5. The **Incoming referrals** and **Unassigned** assessment referrals will be displayed.

The screenshot shows the 'My Dashboard' page in the Assessor Portal. The top navigation bar includes links for Home, My Dashboard, Assessment Referrals, Review requests, Residential Funding Referrals, Find a service provider, Reports and documents, Tasks and notifications, My Aged Care interactions, and Logout. The breadcrumb trail is Home > My Dashboard > Assessment Referrals. The main content area is titled 'My Dashboard' and contains two sections: 'Assessment referrals' and 'Organisation name outlet'. The 'Assessment referrals' section shows a table with one row: 'Organisation name' with a value of '2'. The 'Organisation name outlet' section shows a table with five rows: 'Incoming referrals' (1), 'Triage not started' (0), 'Urgent services pending triage' (0), 'Triage in progress' (1), and 'Assessment unassigned' (0). A red box highlights the '2' in the 'Assessment referrals' table and the '1' in the 'Incoming referrals' row of the 'Organisation name outlet' table. At the bottom left, it says 'Retrieved: DD/MM/YYYY, HH:MM'.

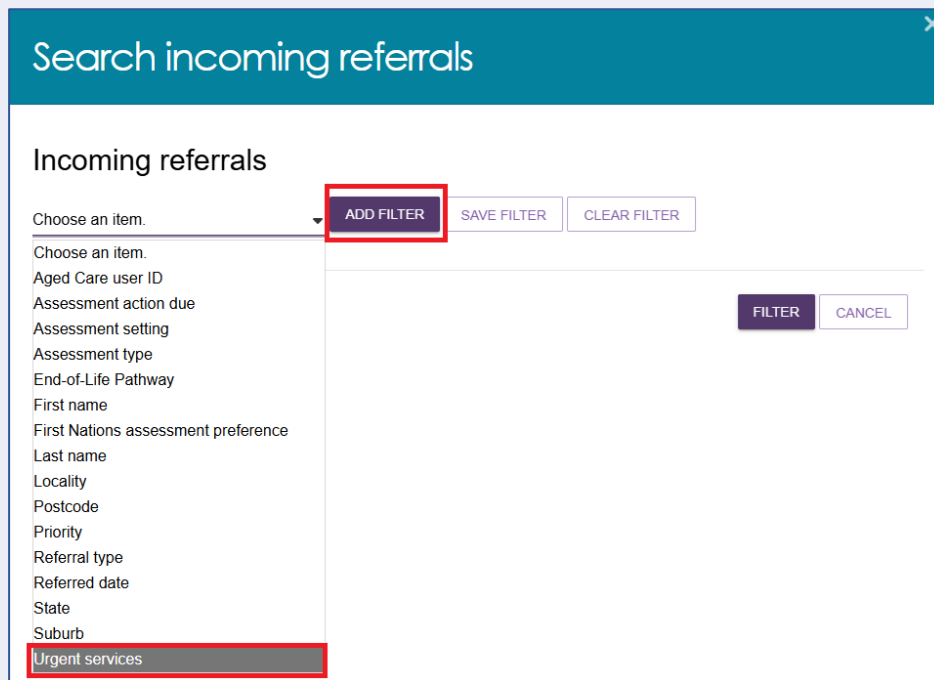
- ! A warning notification will be displayed if there are referrals that have not been actioned within the priority timeframes.



6. To view referrals, select the **Incoming referrals** tab under the **Assessment referrals** page. You can select to view assessment referrals in a card or list view by selecting the card or list icon. Your selection will be retained for the next time you log in to the portal.

The screenshot shows the 'Incoming referrals' page. The top navigation bar is the same as the previous screenshot. The breadcrumb trail is Home > Assessment Referrals. The main content area is titled 'Incoming referrals' and shows 'Currently viewing Organisation Name Outlet'. Below the title are four tabs: 'Incoming referrals', 'Triage pending', 'Accepted referrals', and 'Referral history'. The 'Incoming referrals' tab is selected. To the right of the tabs are two view icons: 'CARD' and 'LIST'. Below the tabs is a 'Filter by' section with a search bar and a 'GO' button. The search bar contains the text 'Sort Referrals by: Last Name' and 'in order of Alphabetical (A-Z)'. Below the search bar is a 'Select all' checkbox. At the bottom right, it says '1 to 1 out of 1 matching result'.

7. Referrals can be filtered or sorted by **Last name**, **First name** or **Aged Care user ID**. You can also search for any referrals that are to urgent services in Advanced Search mode, by selecting **Urgent services** at the drop down and then add the filter.



Search incoming referrals

Incoming referrals

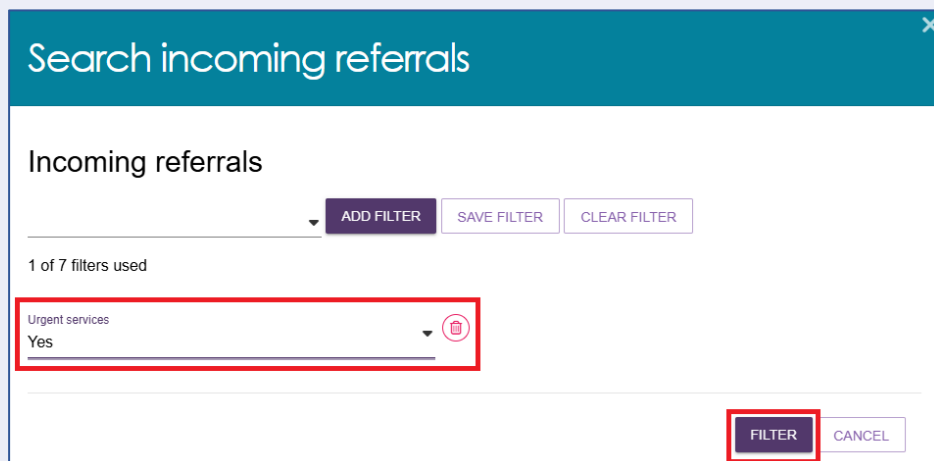
Choose an item. **ADD FILTER** **SAVE FILTER** **CLEAR FILTER**

Choose an item.

- Aged Care user ID
- Assessment action due
- Assessment setting
- Assessment type
- End-of-Life Pathway
- First name
- First Nations assessment preference
- Last name
- Locality
- Postcode
- Priority
- Referral type
- Referred date
- State
- Suburb
- Urgent services**

FILTER **CANCEL**

Once the filter is added, select **Yes** from its drop down, then select **Filter** to activate.



Search incoming referrals

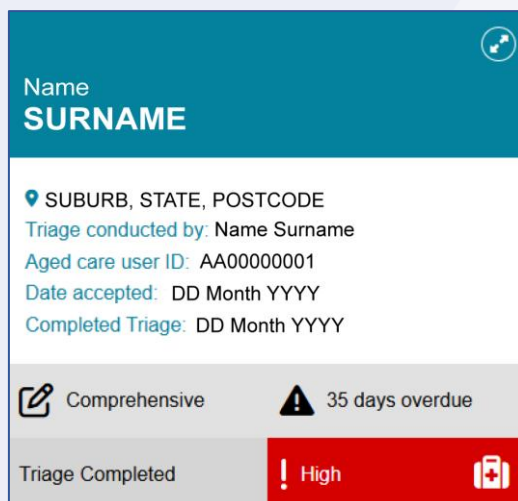
Incoming referrals

1 of 7 filters used

Urgent services **Yes** **FILTER** **CANCEL**

The Urgent Services Indicator, along with the referral's priority will be at the bottom right of the referral card or at the far right of the referral listing.

Card view



Name
SURNAME

📍 SUBURB, STATE, POSTCODE
Triage conducted by: Name Surname
Aged care user ID: AA00000001
Date accepted: DD Month YYYY
Completed Triage: DD Month YYYY

📝 Comprehensive ⚠️ 35 days overdue

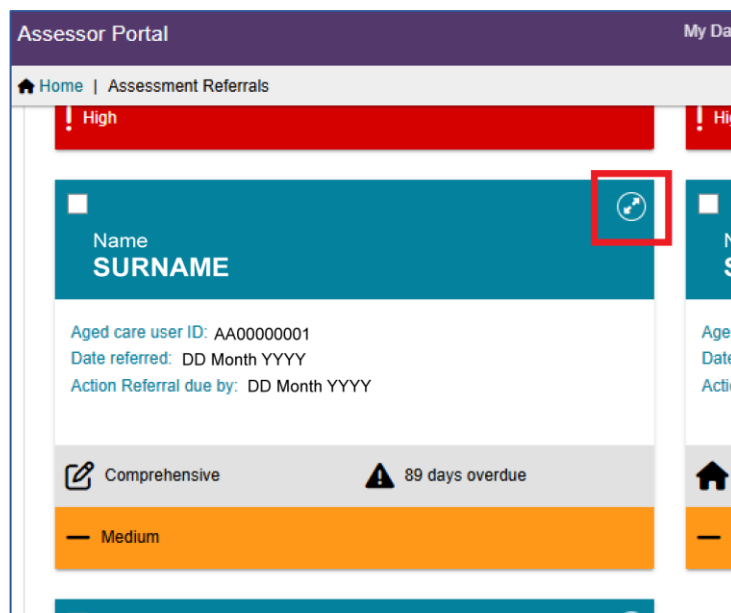
Triage Completed **! High** 🚑

List view

	Aged care		Assessment	Accepted		Assigned	
Name	user ID	Locality	type	date	Status	Date due	to
 SURNAME Name	AA00000 001	SUBURB, STATE, POSTCODE	Home Support	DD/MM/ YYYY	Urgent Services Pending Triage (Completed Triage)	 DD/MM/YYYY (XX days overdue)	Name Surname
							Low 

8. You can view more information on the referred client, including client notes and assessment history by selecting the double arrow (expander) icon on the top right-hand corner of the client card.

! Upon receiving an urgent request, the Team Leader must select the double arrow icon to expand the referral card, verify whether it relates to **the End-of-Life pathway**, and prioritise it accordingly.



Assessor Portal

Home | Assessment Referrals

High

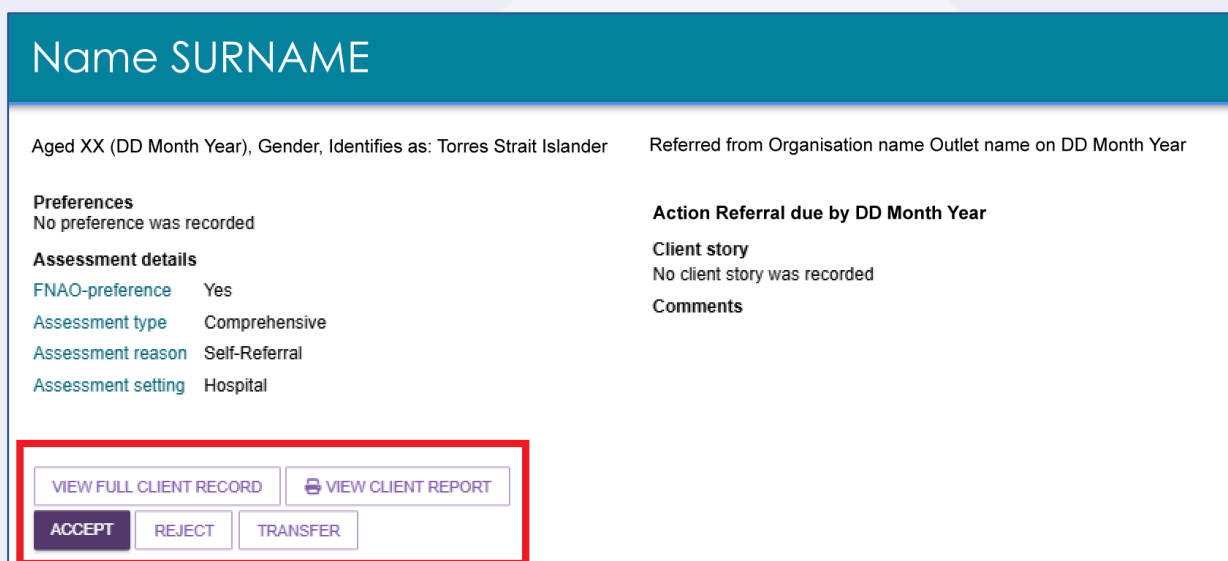
Name
SURNAME

Aged care user ID: AA00000001
Date referred: DD Month YYYY
Action Referral due by: DD Month YYYY

Comprehensive  89 days overdue

Medium

9. A Pop-up screen will appear as below. You can choose to **Accept**, **Reject** or **Transfer** the referral as required.



Name SURNAME

Aged XX (DD Month Year), Gender, Identifies as: Torres Strait Islander

Referred from Organisation name Outlet name on DD Month Year

Preferences
No preference was recorded

Assessment details
FNAO-preference Yes
Assessment type Comprehensive
Assessment reason Self-Referral
Assessment setting Hospital

Action Referral due by DD Month Year
Client story
No client story was recorded
Comments

VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

ACCEPT REJECT TRANSFER

10. The same referral and client information is available in list view. Select the double arrow (expander) icon to the left of the client's name to expand the view.

Filter by

1 to 33 out of 33 matching results

Name	Aged care user ID	Locality	Assessment type	Date referred	Date due	Priority	Select
SURNAME Name	AA00000001	SUBURB, STATE, POSTCODE	Home Support	DD/MM/YYYY	▲ DD/MM/YYYY (XX days overdue)	Low	☐
SURNAME Name	AA00000002	SUBURB, STATE, POSTCODE	Home Support	DD/MM/YYYY	▲ DD/MM/YYYY (XX days overdue)	Low	☐
SURNAME Name	AA00000003	SUBURB, STATE, POSTCODE	Home Support	DD/MM/YYYY	▲ DD/MM/YYYY (XX days overdue)	Medium	☐
SURNAME Name	AA00000004	SUBURB, STATE, POSTCODE	Comprehensive	DD/MM/YYYY	▲ DD/MM/YYYY (XX days overdue)	High	☐
SURNAME Name	AA00000005	SUBURB, STATE, POSTCODE	Comprehensive	DD/MM/YYYY	▲ DD/MM/YYYY (XX days overdue)	Medium	☐

Aged XX (DD Month Year), Gender, Identifies as: Torres Strait Islander Referred from Organisation name Outlet name on DD Month Year

Preferences
No preference was recorded

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

Action Referral due by DD Month Year
Client story
No client story was recorded
Comments

VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

ACCEPT REJECT TRANSFER

! A banner will be displayed on the referral if additional attachments have been added to the client's record as part of an inbound referral.

! If the client has pending support relationships, a banner will be displayed on the referral. Team Leaders and Triage Delegates are able to confirm pending support relationships for clients. The process is described in [My Aged Care - Assessor Portal User Guide 2 - Registering support people and adding relationships](#).

A banner will be displayed on the referral if it was issued as a **Direct referral**.

Direct referrals have the same key performance indicators as regular referrals. The word 'direct', indicates that the client did not receive a Support Plan Review before being referred.

Name SURNAME

DirectReferral
Requested: DD Month Year Requested action date: DD Month Year

Aged XX (DD Month Year), Gender Referred from [referral source] on DD Month Year

Preferences
No preference was recorded

Assessment details
Assessment type Comprehensive
Assessment reason Direct Assessment - Direct referral warning message will be validated in Portal
Assessment setting Non-Hospital

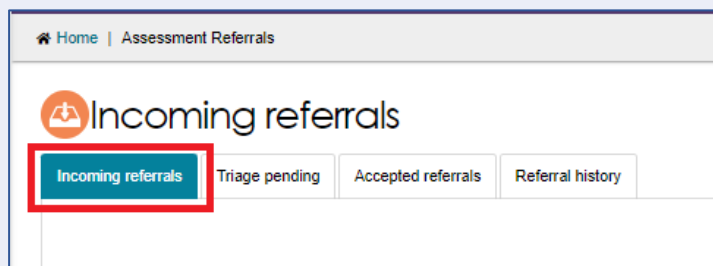
Action Referral due by DD Month Year
Client story
DD/MM/YYYY
DD/MM/YYYY

Support plan review DD Month Year
Support plan DD Month Year
Comprehensive Assessment DD Month Year
Comprehensive Assessment DD Month Year

VIEW ALL 10 CLIENT NOTES

Comments
Cohabitant details

11. If you want to view the information available in the client record you can either go back on your internet browser to return to the **Incoming referrals** page or choose the **Incoming referrals** option from the tool bar.



Accepting incoming assessment referrals and changing the priority

Once a Team Leader has viewed the client record, they can accept or reject the referral. Follow the steps below to accept a referral and change the priority of a referral if required.

1. Select **ACCEPT** from the expanded card or list view.

Name SURNAME

Aged XX (DD Month Year), Gender, Identifies as: Torres Strait Islander
Referred from Organisation name Outlet name on DD Month Year

Preferences
No preference was recorded

Assessment details
FNAO-preference Yes
Assessment type Comprehensive
Assessment reason Self-Referral
Assessment setting Hospital

Action Referral due by DD Month Year
Client story
No client story was recorded
Comments

VIEW FULL CLIENT RECORD
VIEW CLIENT REPORT

ACCEPT
REJECT
TRANSFER

! Team Leaders can bulk-accept assessment referrals by selecting the tick box next to each client they would like to accept, or by using **SELECT ALL** for all client referrals assigned to their outlet.

The bulk-accepting function defaults the clients' priority to medium. Team leaders will be unable to change the priority when bulk-accepting referrals. Bulk-accepting will default assessment setting to **Non-Hospital**. Team Leaders can then change the setting to **Hospital** as required.

Incoming referrals

Currently viewing Organisation/ Outlet Name

Incoming referrals
Triage pending
Accepted referrals
Referral history

CARD
LIST

Filter by

☐ Select all

Sort Referrals by:
Last Name

In order of
Alphabetical (A-Z)

GO

1 to 5 out of 5 matching results

- Confirm that the priority of the assessment referral is correct and select the **Assessment setting**. To change the assessment priority, choose from the options provided in the drop down.

! When accepting a referral, team leaders can add a free text information into the **Triage category**. Once the referral has been accepted, the information can be used to assist with finding referrals via the search function. This free text option is not to be confused with the triage process that is a required process for accepting referrals.

Accept this referral for Name Surname

Change assessment priority? ⓘ
Medium

Triage category:

Assessment setting: ⓘ
☐ Hospital
☒ Non-Hospital

ACCEPT CANCEL

Team leaders can change the assessment priority as well as the assessment setting for a referral as required.

Accept this referral for Name Surname

Change assessment priority? ⓘ
 Medium
 Low
 Medium
 High

Assessment setting: ⓘ
☒ Hospital
☐ Non-Hospital

ACCEPT CANCEL

! Direct referrals priority default to being high when issued. Team leaders can change the priority of direct referrals when accepting if they determine the client can safely access the assessment at a lower priority level.

3. When updating the assessment priority, a relevant reason for changing the priority will need to be selected from the dropdown list with a reason to be provided in the free text box. If the assessment priority is changed, a new priority timeframe will be calculated and applied to the referral.

A reason for changing priority is mandatory if the priority is changed. Users can select from the following options before accepting the referral.

Accept this referral for Name Surname

Change assessment priority? ?

High

Reason for changing priority *

Please select

Please select

- Changed circumstances
- Incorrect priority assigned
- Further functional decline
- Entered emergency care
- End-of-Life Pathway
- Other (please specify)

4. To change the assessment setting, you can update the assessment setting by selecting **Edit Assessment Setting** in the expanded client card, depending on your role:
- the team leader on the **accepted referrals** view, or
 - the assessor on the **current work** view.

! The timeframe will continue to be calculated from the date the referral was issued, not the date the priority was changed.

Name SURNAME

Accepted on DD Month Year

Completed Support Plan due by DD Month Year

Client story

No client story was recorded

Comments

Preferences

No preference was recorded

Assessment details

FNAO-preference Yes

Assessment type Comprehensive

Assessment reason Self-Referral

Assessment setting Hospital

Assessor Name Surname

Triage conducted by Name Surname

Support plan ● In Progress

Comprehensive Assessment ● In Progress

VIEW FULL CLIENT RECORD

VIEW CLIENT REPORT

5. Once the assessment setting is selected, select **SAVE**.

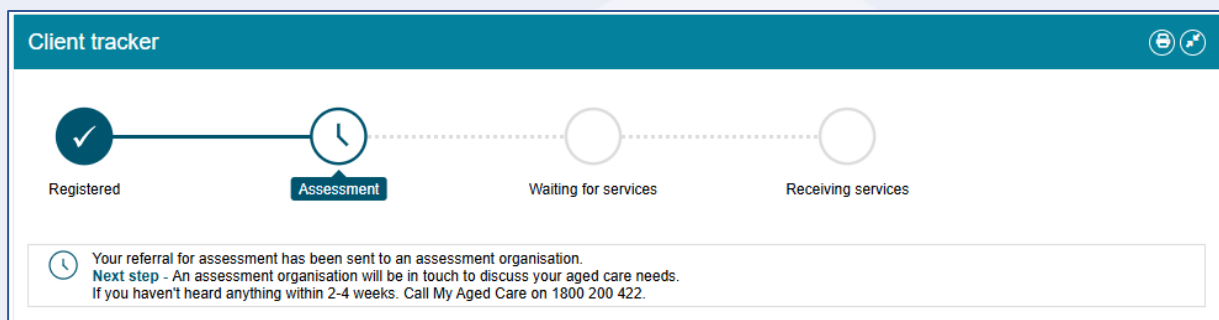
- ! As part of the Single Assessment System Program contract, key performance indicators will consider the setting in which the interaction with the client takes place, specifically a Non-Hospital or Hospital setting.

Team leaders can select the assessment setting while accepting the referral.

Before commencing the assessment, assessors should verify the information entered by the team leader, noting that the assessment setting may have changed since between the time of the acceptance of the referral and when the assessment takes place.

When the assessment is finalised, the **Assessment setting** field on the expanded client card or list view must align with the type of assessment setting recorded within the Intergrated Assessment Tool (IAT). Assessment setting fields can be edited if required, until the Support Plan is completed.

6. Once the referral has been accepted, the referral will move into the [Triage pending tab under Unassigned](#). The Client Journey Tracker will also be updated to indicate that the assessment referral has been accepted.



Unassigning or reassigning an assessment referral

Team Leaders can unassign an assessment referral and reassign the referral to another assessor in the same outlet. There is no limit on the number of times referrals can be unassigned or reassigned.

1. From the **Accepted referrals** tab, access the expanded referral view by selecting the expand icon (double arrow) on the client card.

Accepted referrals

Incoming referrals | Triage pending | **Accepted referrals** | Referral history

Filter by

Sort Referrals by: Priority in order of High to Low **GO**

Current sort order is Priority

Name SURNAME

Suburb, State, Postcode
Aged care user ID: AA00000001
Date accepted: DD Month YYYY
Completed Triage: DD Month YYYY

Comprehensive 391 days overdue

Triage Completed High

2. Select **REASSIGN**. If using list view, select **REASSIGN** from the expanded view.

Name SURNAME

Preferences
No preference was recorded

Assessment details
Assessment type: Comprehensive
Assessment reason: the client has needs that exceed a basic support programme
Assessment setting: Non-Hospital
Assessor: Name Surname
Triage conducted by: Name Surname

Completed triage due by DD Month YY

Client story
No client story was recorded

Comments

Comprehensive Assessment: Triage Completed
Latest screening: DD Month YYYY

VIEW FULL CLIENT RECORD **VIEW CLIENT REPORT**

REASSIGN **REJECT** **TRANSFER**

3. Select the assessor that the referral is being assigned to and select **SAVE**. If the referral is going to be unassigned and added back to the queue, select **Unassign and add to the queue**. You can also re-assign to a specific assessor from here.

Re-assign this referral for Name Surname

Comprehensive Assessment, currently assigned to **Name Surname**
Assign to: *

- ☐ Name Surname (0 assessments assigned)
- ☐ Name Surname (0 assessments assigned)
- ☐ Name Surname (0 assessments assigned)
- ☐ Name Surname (47 assessments assigned)
- ☐ Name Surname (109 assessments assigned)
- ☒ Unassign and add to the queue

Triage category:

4. If reassigned, the assessment referral will appear under the relevant assessor in the list of **Accepted referrals**.

Accepted referrals

Currently viewing Outlet Name

Incoming referrals | Triage pending | **Accepted referrals** | Referral history

Filter by

Sort Referrals by: Last Name | In order of: Alphabetical (A-Z) | GO

61 to 72 out of 72 matching results

Name Surname

Name SURNAME
SUBURB, STATE, POSTCODE
Aged care user ID: AA00000001
Date accepted: DD Month YYYY
Delegate Decision: DD Month YYYY
Comprehensive 446 days overdue
Awaiting Delegate Decision Low

Name SURNAME
SUBURB, STATE, POSTCODE
Aged care user ID: AA00000002
Date accepted: DD Month YYYY
First Clinical Intervention: DD Month YYYY
Comprehensive 431 days overdue
Downloaded Low

Name SURNAME
SUBURB, STATE, POSTCODE
Aged care user ID: AA00000003
Date accepted: DD Month YYYY
First Clinical Intervention: DD Month YYYY
Comprehensive 443 days overdue
Assessment In Progress Low

Name SURNAME
SUBURB, STATE, POSTCODE
Aged care user ID: AA00000004
Date accepted: DD Month YYYY
First Clinical Intervention: DD Month YYYY
Comprehensive 445 days overdue
Downloaded Low

5. If unassigned, the referral will appear under **Unassigned** in the list of **Accepted Referrals**.

Accepted referrals

Currently viewing Outlet Name

Incoming referrals | Triage pending | **Accepted referrals** | Referral history

Filter by

Sort Referrals by: Last Name | In order of: Alphabetical (A-Z) | GO

61 to 72 out of 72 matching results

Unassigned

Name SURNAME
Hospital name
SUBURB, STATE, POSTCODE
Aged care user ID: AA00000001
Date accepted: DD Month YYYY
Completed Support Plan: DD Month YYYY
Comprehensive
Triage Completed Low

Name SURNAME
SUBURB, STATE, POSTCODE
Aged care user ID: AA00000002
Date accepted: DD Month YYYY
Completed Support Plan: DD Month YYYY
Comprehensive 491 days overdue
Triage Completed Low

Name SURNAME
SUBURB, STATE, POSTCODE
Aged care user ID: AA00000003
Date accepted: DD Month YYYY
Completed Support Plan: DD Month YYYY
Comprehensive 490 days overdue
Triage Completed Low

Name SURNAME
SUBURB, STATE, POSTCODE
Aged care user ID: AA00000004
Date accepted: DD Month YYYY
Completed Support Plan: DD Month YYYY
Comprehensive
Delegate Decision Complete Medium

i

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

14

OFFICIAL

Assigning Triage

! Triage must be completed by a clinical staff member who holds the Triage Delegate role in the My Aged Care assessor portal.

For further information on the Triage Delegate role, visit [Assessor Portal User Guide 12 - Managing Delegate Roles](#).

Once an assessment referral has been accepted, it will display with a Triage pending status. A Triage Delegate will then need to assign the referral to themselves or to another Triage Delegate for triage.

Once an assessment has been assigned to a Triage Delegate, they can either:

- proceed with the triage
- reassign the triage to another Triage Delegate, or
- unassign themselves and place the accepted referral back into the triage pending queue.

If the incoming assessment referral is a reassessment that was initiated as part of a Support Plan Review, the assessor or Triage Delegate can start the triage and save triage responses, but only the Triage Delegate can complete the triage. An Information message will be displayed on the client card or listing. For assessors, the **Assign to Triage Delegate** button will also be available.

i The need for this new assessment was identified while conducting a support plan review. An assessor can start triage and enter triage information obtained from the client, but only a Triage Delegate can complete triage.

Aged XX (DD Month Year), Gender		Referred from [referral source] on DD Month Year	
Preferences No preference was recorded		Accepted on DD Month Year	
Assessment details		First Clinical Intervention due by DD Month Year	
Assessment type	Home Support	Client story No client story was recorded	
Assessment reason	No assessment reason was recorded	Comments	
Assessment setting	Non-hospital		
Triage category	Data		
Assessor	Name Surname		
Latest screening	DD Month Year		

VIEW FULL CLIENT RECORD

 VIEW CLIENT REPORT

START TRIAGE

ASSIGN TO TRIAGE DELEGATE

REFER URGENT SERVICES

FLAG AS END OF LIFE

1. To access triage pending referrals, select the **Triage pending** tab within the **ASSESSMENT REFERRALS** tile.

! If the Triage delegate has access to multiple outlets, one will need to be selected before continuing with triage.

2. Once a referral has been accepted it will be under **Triage pending** and unassigned. You will have to filter the **Assigned to** drop down and select **unassigned**, then select **FILTER**.

At this stage the Triage Delegate can also filter for other criteria including those that are tagged as urgent services in the referral. Select **Urgent services** at the drop down and then add the filter.

Once the filter is added, select **Yes** from its drop down, then select **Filter** to activate.

Search triage pending

Triage pending

ADD FILTER

SAVE FILTER

CLEAR FILTER

2 of 7 filters used

Urgent services

Yes

Assigned to

Assigned to me

FILTER

CANCEL

The Urgent Services Indicator, along with the referral's priority, will be at the bottom right of the referral card or at the far right of the referral listing.

Card view

Name

SURNAME

Aged care user ID: AA00000001

Date accepted: DD Month YYYY

Completed Triage due by: DD Month YYYY

Home Support

22 days overdue

Urgent Services Pending Triage

Low

List view

Name	Aged care user ID	Locality	Assessment type	Accepted date	Status	Date due	Priority
SURNAME Name	AA00000001		Home Support	DD/MM/YYYY	Urgent Services Pending Triage (Completed Triage)	DD/MM/YYYY (XX days overdue)	Low

- Expand the client card which you would like to assign triage for. To assign to yourself or another Triage Delegate for action select **ASSIGN**.

Name SURNAME

Aged XX (DD Month Year), Gender

Referred from Organisation name Outlet name on DD Month Year

Accepted on DD Month Year

Preferences

No preference was recorded

Assessment details

Assessment type

Comprehensive

Assessment reason

Self-Referral

Assessment setting

Non-Hospital

Completed Support Plan due by DD Month Year

Client story

No client story was recorded

Comments

VIEW FULL CLIENT RECORD

VIEW CLIENT REPORT

ASSIGN

REJECT

TRANSFER

! To transfer the referral to another outlet for triage select **TRANSFER**. For further information on transferring a referral, refer to the section [Transferring an assessment referral to another outlet or organisation](#).

To reject the referral, select **REJECT**. For further information on rejecting a referral please view the section [Rejecting an assessment referral](#).

- When selecting **ASSIGN** a pop up will appear. From this you will be able to assign the triage decision for the client either to yourself or other Triage Delegates from the selected outlet. Once this has been chosen, select **ASSIGN**.

Assign triage decision for Name Surname

Assign to*

☒ Me

☐ Name Surname

☐ Name Surname

☐ Name Surname

☐ Name Surname

☐ Name Surname

☐ Name Surname

ASSIGN

CANCEL

- Once the triage has been assigned, the client card will appear under the **Triage pending** tab., Ensure that the **Assigned** filter is set to **Assigned to me** so that clients assigned to you can be found under the **Triage Not Started** heading.

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

18

OFFICIAL

Home | Assessment Referrals

FILTER CLEAR

Sort Referrals by: Accepted Date in order of Earliest to Latest GO

Current sort order is Accepted Date

Triage Not Started

Name SURNAME

SUBURB, STATE, POSTCODE
Aged care user ID: AA00000001
Date accepted: DD Month YYYY
Completed Support Plan: DD Month YYYY

Comprehensive 173 days overdue

Triage Not Started Low

Successfully assigned for triage.

Some assessments have overdue SLAs and need to be scheduled.

6. Select the expand card icon on the client tile. The expanded client card will have the options to:

- [Start triage](#)
- Reassign to an [assessor](#) or [triage delegate](#)
- [Refer to urgent services](#)
- [Reject an assessment referral](#)
- [Transferring an assessment referral to another outlet or organisation](#)
- [Flag as End-of-Life](#)
- [Decide not eligible to continue with the assessment.](#)

! A client can also be flagged as End-of-Life if there is a recommendation from a qualified medical professional from this screen. The steps to [complete an End-of-Life process](#) is explained in this document as well as in [Assessor Portal User Guide 6 – Completing an Assessment](#).

Name SURNAME

Please confirm that Name Surname, DD Month Year, XX years, AA00000001 is the person you are conducting this assessment for. If the person details are incorrect, a privacy breach may occur.

Aged XX (DD Month Year), Gender

Referred from [referral source] on DD Month Year
Accepted on DD Month Year

Preferences
No preference was recorded

Completed triage due by DD Month Year

Client story
DD/MM/YYYY

Assessment details
Assessment type Home Support
Assessment reason

Latest screening DD Month Year

VIEW ALL 1 CLIENT NOTES

Comments

VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

START TRIAGE REASSIGN **DECIDE NOT ELIGIBLE** REFER URGENT SERVICES REJECT TRANSFER FLAG AS END-OF-LIFE

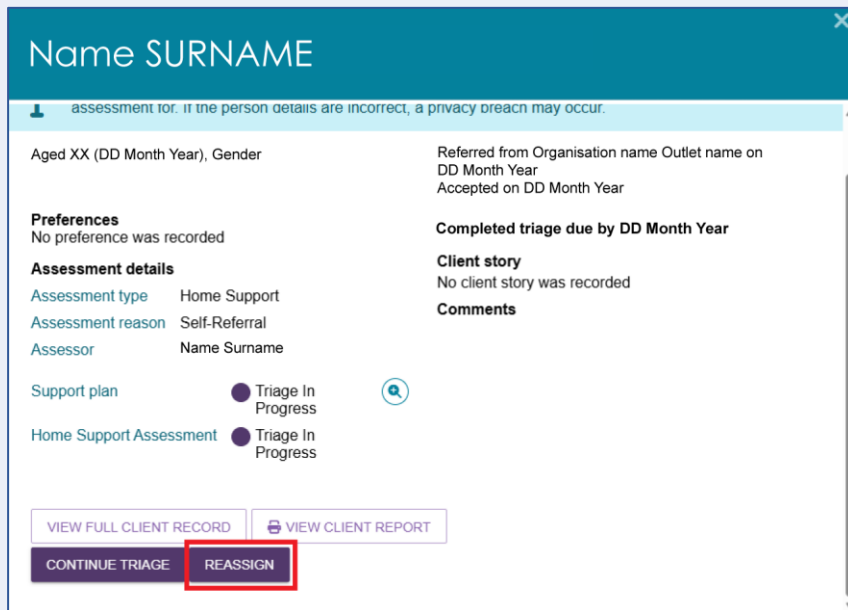
Reassigning Triage

To reassign triage, select **REASSIGN** from the client's card or listing. Alternative Triage Delegates from the same outlet will be provided as well as the option to **Place back in the delegate queue**. This option will place the client back into a **Triage pending** status and in the queue for allocation.

For an assessor or triage delegate dealing with a reassessment originating from a Support Plan Review, the Reassign function becomes the **ASSIGN TO TRIAGE DELEGATE** button. In this scenario you must assign to another triage delegate from your outlet. There is no option to place the triage decision back in the triage queue.

Reassign (Triage in Progress, or Triage Pending)

Card View



Name SURNAME

assessment for. If the person details are incorrect, a privacy breach may occur.

Aged XX (DD Month Year), Gender

Referred from Organisation name Outlet name on DD Month Year
Accepted on DD Month Year

Preferences
No preference was recorded

Completed triage due by DD Month Year

Assessment details

Assessment type Home Support

Assessment reason Self-Referral

Assessor Name Surname

Client story
No client story was recorded

Comments

Support plan ☒ Triage In Progress

Home Support Assessment ☒ Triage In Progress

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

[CONTINUE TRIAGE](#) [REASSIGN](#)

List View



Current assessments

Currently viewing Organisation/ Outlet Name

Current assessments

Recent assessments

CARD

LIST

Filter by

1 to 12 out of 12 matching results

Name	Aged care user ID	Locality	Assessment type	Accepted date	Status	Date due	Priority
 SURNAME Name	AA00000001	Suburb, STATE, Postcode	Home Support	DD/MM/YYYY	Triage In Progress (Completed Triage)	 DD/MM/YYYY (XX days overdue)	 Low

 Please confirm that Name Surname, DD Month Year, XX years, AA00000001 is the person you are conducting this assessment for. If the person details are incorrect, a privacy breach may occur.

Aged XX (DD Month Year), Gender

Preferences
No preference was recorded

Assessment details
Assessment type Home Support
Assessment reason Self-Referral
Assessor Name Surname

Support plan
☒ Triage In Progress

Home Support Assessment
☒ Triage In Progress

Referred from Organisation name Outlet name on DD Month Year
Accepted on DD Month Year

Completed triage due by DD Month Year

Client story
No client story was recorded

Comments

VIEW FULL CLIENT RECORD

VIEW CLIENT REPORT

CONTINUE TRIAGE

REASSIGN

Re-assign Triage Decision pop-up

Re-assign triage decision for Name Surname

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

Triage decision currently assigned to Name Surname

Re-assign to:*

☐ Name Surname
☐ Name Surname
☐ Name Surname
☐ Place back in triage queue

RE-ASSIGN

CANCEL

Assign to Triage Delegate (Reassessment from a Support Plan Review)

1. Select **ASSIGN TO TRIAGE DELEGATE** from the client's card or listing.

Card View

Name SURNAME

Please confirm that Name Surname, DD Month Year, XX years, AA00000001 is the person you are conducting this assessment for. If the person details are incorrect, a privacy breach may occur.

The need for this new assessment was identified while conducting a support plan review. An assessor can start triage and enter triage information obtained from the client, but only a Triage Delegate can complete triage.

Aged XX (DD Month Year), Gender, Identifies as: Aboriginal

Referred from Organisation name Outlet name on DD Month Year
Accepted on DD Month Year

Preferences
No preference was recorded

Assessment details

FNAO-preference No

Assessment type Comprehensive

Assessment reason Portal Referral

Assessment setting Non-Hospital

Assessor Name Surname

Support plan review DD Month Year

Support plan DD Month Year

Comprehensive Assessment DD Month Year

This assessment referral has been generated from a support plan review where it has been identified that the client requires a new assessment.

Completed triage due by DD Month Year

Client story
No client story was recorded

Comments

VIEW FULL CLIENT RECORD

VIEW CLIENT REPORT

START TRIAGE

ASSIGN TO TRIAGE DELEGATE

REFER URGENT SERVICES

List View

Current assessments

Currently viewing Organisation Name Outlet

Current assessments Recent assessments

CARD LIST

Filter by

1 to 14 out of 14 matching results

Name	Aged care user ID	Locality	Assessment type	Accepted date	Status	Date due	Priority
SURNAME Name	AA00000001	SUBURB, STATE, POSTCODE	Comprehensive	DD/MM/YYYY	Triage Not Started (Completed Triage)	DD/MM/YYYY (Due in XX days)	Medium

The need for this new assessment was identified while conducting a support plan review. An assessor can start triage and enter triage information obtained from the client, but only a Triage Delegate can complete triage.

Aged XX (DD Month Year), Gender, Identifies as: Aboriginal

Referred from Organisation name Outlet name on DD Month Year
Accepted on DD Month Year

Preferences
No preference was recorded

Assessment details

FNAO-preference No

Assessment type Comprehensive

Assessment reason Portal Referral

Assessment setting Non-Hospital

Assessor Name Surname

Support plan review DD Month Year

Support plan DD Month Year

Comprehensive Assessment DD Month Year

This assessment referral has been generated from a support plan review where it has been identified that the client requires a new assessment.

Completed triage due by DD Month Year

Client story
No client story was recorded

Comments

VIEW FULL CLIENT RECORD

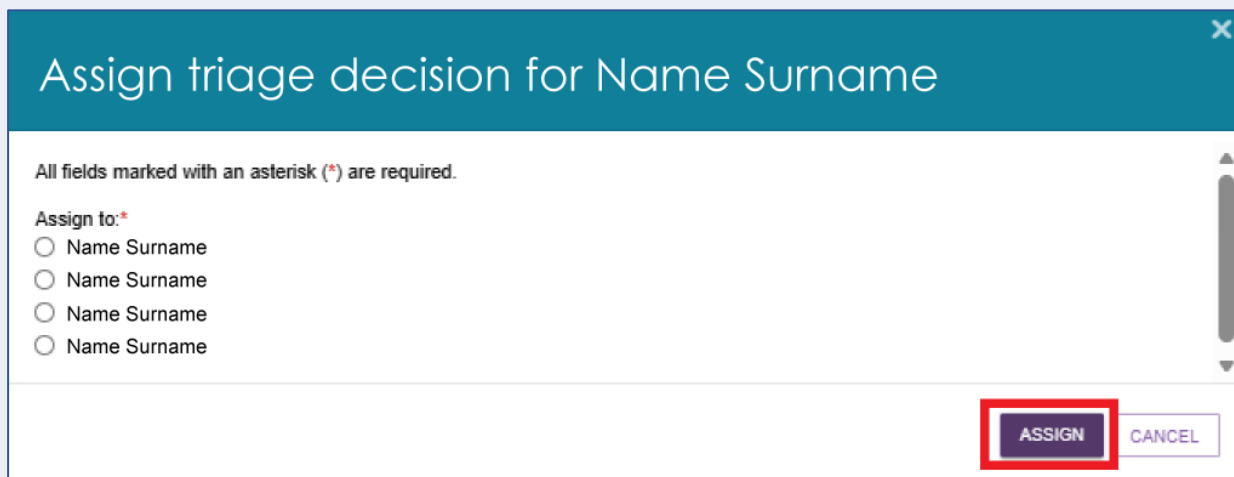
VIEW CLIENT REPORT

START TRIAGE

ASSIGN TO TRIAGE DELEGATE

REFER URGENT SERVICES

- The **Assign triage decision** pop up appears. Select the triage delegate, and then select **ASSIGN**.



Assign triage decision for Name Surname

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

Assign to:*

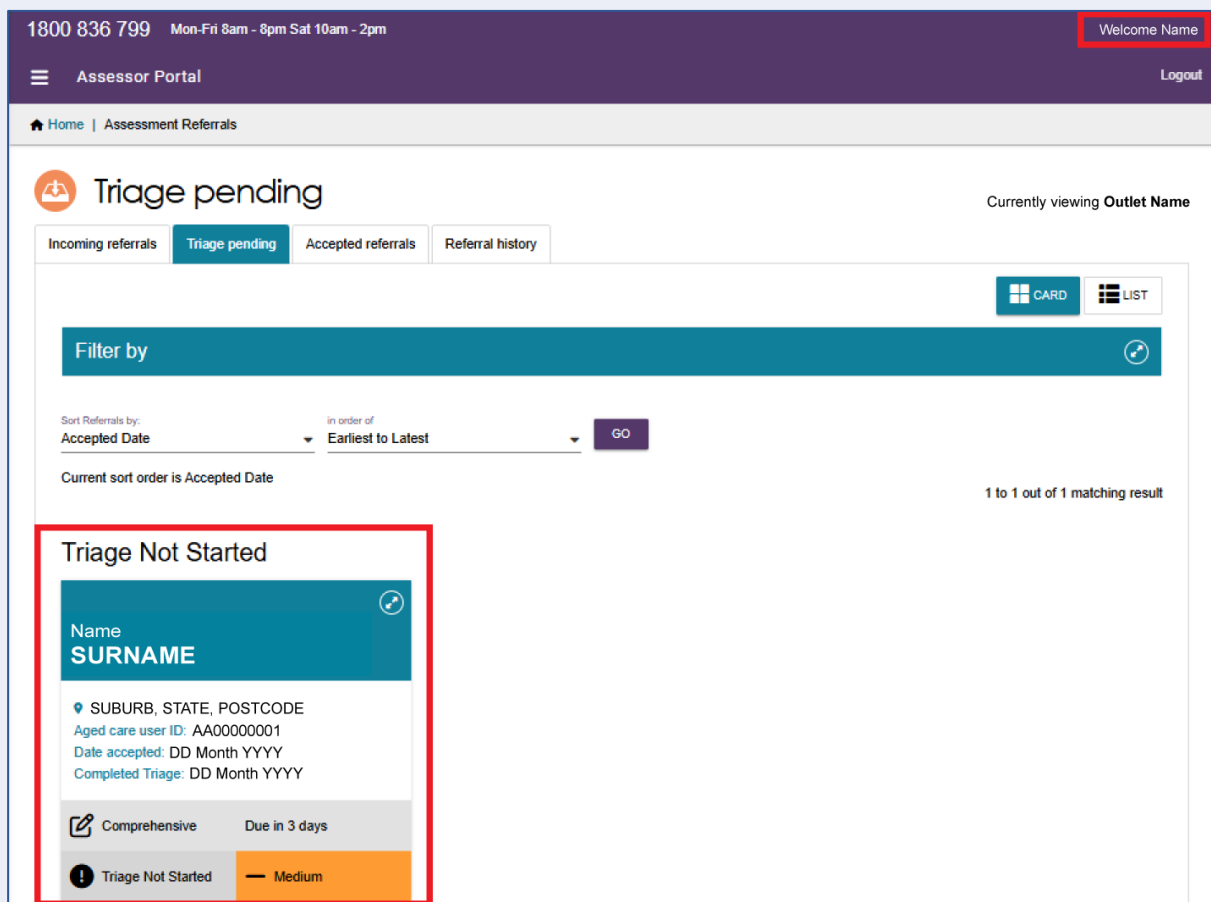
- ☐ Name Surname
- ☐ Name Surname
- ☐ Name Surname
- ☐ Name Surname

ASSIGN CANCEL

- Once assigned, a green banner appears: 'Triage decision successfully assigned'.



The client's assessment will now display in the new triage delegate's queue.



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

Assessor Portal Logout

Home | Assessment Referrals

Triage pending

Currently viewing Outlet Name

Incoming referrals Triage pending Accepted referrals Referral history

Filter by

Sort Referrals by: Accepted Date in order of: Earliest to Latest GO

Current sort order is Accepted Date

1 to 1 out of 1 matching result

Triage Not Started

Name SURNAME

SUBURB, STATE, POSTCODE

Aged care user ID: AA00000001

Date accepted: DD Month YYYY

Completed Triage: DD Month YYYY

Comprehensive Due in 3 days

Triage Not Started Medium

Decide not eligible for assessment before starting triage

! Once the Triage Delegate has [referred urgent services](#) to the client, the Decide Not Eligible function no longer applies.

Triage Delegates can mark a client as 'Ineligible for assessment' without needing to conduct a triage. This functionality is available when a referral is accepted, triage has not started, and there is no urgent service recommended by the Triage Delegate.

This is only applicable for the following circumstances:

- The client is not an Aboriginal or Torres Strait Islander person and is less than 65 years of age
- The client is an Aboriginal or Torres Strait Islander person and is less than 50 years of age
- The client is less than 50 years of age and is homeless or at risk of homelessness.

1. From the Organisation Administration tile, go to the Triage Pending tab. Search for the client that you wish to decide not eligible and select **DECIDE NOT ELIGIBLE**.

List View

The screenshot shows the 'Triage pending' interface. At the top, there are tabs for 'Incoming referrals', 'Triage pending' (highlighted with a red box), 'Accepted referrals', and 'Referral history'. Below the tabs is a 'Filter by' search bar. A table lists one client with the following details:

Name	Aged care user ID	Locality	Assessment type	Accepted date	Status	Date due	Assigned to	Priority
SURNAME Name	AA00000001	SUBURB, STATE, POSTCODE	Comprehensive	DD/MM/YYYY	Triage Not Started (Completed Triage)	DD/MM/YYYY (XX days overdue)	Name Surname	Mediu m

Below the table, there are sections for 'Preferences', 'Assessment details', 'Support plan review', and 'Comprehensive Assessment'. At the bottom, there are several buttons: 'VIEW FULL CLIENT RECORD', 'VIEW CLIENT REPORT', 'START TRIAGE', 'ASSIGN TO TRIAGE DELEGATE', 'DECIDE NOT ELIGIBLE' (highlighted with a red box), 'REFER URGENT SERVICES', 'REJECT', 'TRANSFER', and 'FLAG AS END-OF-LIFE'.

Card View

Name SURNAME

Please confirm that Name Surname, DD Month Year, XX years, AA00000001 is the person you are conducting this assessment for. If the person details are incorrect, a privacy breach may occur.

Aged XX (DD Month Year), Gender

Referred from [referral source] on DD Month Year
Accepted on DD Month Year

Preferences
No preference was recorded

Assessment details
Assessment type Home Support
Assessment reason

Completed triage due by DD Month Year

Client story
DD/MM/YYYY

VIEW ALL 1 CLIENT NOTES

Latest screening DD Month Year

Comments

VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

START TRIAGE REASSIGN **DECIDE NOT ELIGIBLE** REFER URGENT SERVICES REJECT TRANSFER FLAG AS END-OF-LIFE

2. The **Decide Not Eligible** pop up appears.

There is a warning message that states you have determined in your capacity as the System Governor that the individual does not meet the eligibility criteria set out under Section 58 of the Aged Care Act (2024).

Select the link **read more +** to expand this message.

Decide not eligible

You have determined in your capacity as the System Governor that the individual does not meet the eligibility criteria set out under section 58 under the Aged Care Act 2024. **Read more +**

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

Please select which of the following reasons apply:*

☐ Participant is younger than 65 and not First Nations or homeless/at risk of homelessness

☐ Participant is 49 years old or younger

CONFIRM CANCEL

3. Select the reason why the client is not eligible for assessment:

- Participant is younger than 65 and not First Nations or homeless/at risk of homelessness
- Participant is 49 years old or younger

Then select **CONFIRM**.

Once a Triage Delegate decides that the client is Not Eligible for assessment, they can then [generate and/or upload the corresponding Ineligibility Letter](#).

Decide not eligible

You have determined in your capacity as the System Governor that the individual does not meet the eligibility criteria set out under section 58 under the Aged Care Act 2024.

The System Governor must not make an eligibility determination for an aged care needs assessment for an individual unless the System Governor considers that:



- (a) the individual:
- (i) is aged 65 or over; or
 - (ii) is an Aboriginal or Torres Strait Islander person and is aged at least 50; or
 - (iii) is homeless, or at risk of homelessness, and is aged at least 50; and
- (b) information of a kind prescribed by the rules has been provided relating to the individual's care needs; and
- (c) if the individual is aged less than 65, the individual:
- (i) has elected, in the approved form, to be provided with funded aged care services before the individual turns 65; and
 - (ii) has been informed of any other services that may be available to meet the care needs of the individual

[Read less -](#)

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

Please select which of the following reasons apply:*

- ☐ Participant is younger than 65 and not First Nations or homeless/at risk of homelessness
- ☐ Participant is 49 years old or younger

CONFIRM

CANCEL

Completing Triage

In the Assessments tile under the Triage pending tab, clients whose triage has not been completed will display under the Triage Not Started heading.

- Expand the client card to view the assessment details such as the Assessment Type, Assessment Reason, Assessment setting, Assessor, Eligibility at Screening and Latest screening (if any).

Name SURNAME



Please confirm that Name Surname, DD Month Year, XX years, AA00000001 is the person you are conducting this assessment for. If the person details are incorrect, a privacy breach may occur.

Aged XX (DD Month Year), Gender

Referred from [referral source] on DD Month Year
Accepted on DD Month Year

Preferences

No preference was recorded

Completed triage due by DD Month Year

Assessment details

Assessment type Home Support

Assessment reason the client does not require ongoing support or has ongoing multiple needs that impact their ability to remain living in the community

Eligibility at screening Unlikely to be eligible

Latest screening DD Month Year

Client story

No client story was recorded

Comments

[VIEW FULL CLIENT RECORD](#)

[VIEW CLIENT REPORT](#)

[START TRIAGE](#)

[REASSIGN](#)

[REFER URGENT SERVICES](#)

[REJECT](#)

[TRANSFER](#)

[FLAG AS END OF LIFE](#)

! The Eligibility at Screening is not a formal eligibility decision under the Aged Care Act 2024. It serves as an indication that the client may not meet the eligibility criteria for an assessment. The final eligibility decision for assessment must be made by the Triage Delegate. For more information refer to the [Assessment Manual](#).

4. Triage Delegate needs to record who the **Consent was obtained from**. Options provided are:

- the client
- the client with support person
- consent was not given
- the supporter guardian.

Consent for Triage

- The client can provide their informed consent independently.
- The client can provide their informed consent with the assistance of their supporter, decision-making supporter, or guardian.
- The client lacks capacity and requires their decision-making supporter or guardian to provide consent on their behalf (this consent cannot be provided by their supporter).

If a supporter, decision-making supporter or guardian (includes other persons in a similar position to a guardian as defined under subsection 28(2) of the Aged Care Act 2024) is required, they must be registered as a such in My Aged Care prior to obtaining the client's consent.

The assessor can also use the 'Notes' section in the client's record to:

- record any detail or the circumstances regarding the handling of a client's personal information); and
- record any instructions relating to the assessor's conversation with the client (or supporter, decision-making supporter or guardian with respect to informed consent).

Script to be read.

In giving your consent for me, to check your eligibility for an aged care assessment you understand that:

- The assessment organisation will collect information that allows them to assess your eligibility for an aged care assessment.
- As part of the assessment, the assessment organisation will collect personal information about you, such as your name and address, and information about your health and care needs.
- The information you provide will be recorded in your My Aged Care client record and will be used and disclosed by the assessment organisation, the Department of Health and Aged Care as well as any aged care providers while providing aged care services to you.
- If you provide the assessment organisation with personal information about other people such as your family or your support person, you confirm that you have obtained the other person's consent and that you have brought the contents of the privacy notice which is set out at [privacy notice web address](#) to their attention. Information about these other people will be included in your My Aged Care client record and will be handled in the same way as your own personal information - being for the purpose of providing aged care services to you.
- The information you provide may also be recorded in the assessment organisation's IT systems and will be used and disclosed by the assessment organisation for the purpose of determining your eligibility for and priority of an aged care assessment.
- The assessment organisation may share your personal information with other organisations to manage the support you need, for example, the Department of Health and Aged Care, and aged care or health providers.
- As we go through the aged care eligibility check process, please tell me if you do not want any of your information to be recorded. We can discuss how to manage this further.
- You can change your mind and withdraw your consent to participate in the aged care eligibility check process at any time. However, this will mean the assessment organisation cannot check your eligibility for aged care services and cannot conduct your aged care assessment. You will need to arrange your own aged care services.
- You can view the privacy notice which is set out at [privacy notice web address](#) as well as the My Aged Care privacy policy on the My Aged Care website at [myagedcare.gov.au](#) for more information on how we handle your personal information.
- Do we have your consent to assess the eligibility of Sandra SMITH for an aged care assessment?

Consent Obtained From *

Select one

Select one

The client

The client with support person

Consent was not given

The supporter guardian

5. Once the selection is made, select **CONTINUE** to progress to the next stage

Script to be read.

In giving your consent for me, to check your eligibility for an aged care assessment you understand that:

- The assessment organisation will collect information that allows them to assess your eligibility for an aged care assessment.
- As part of the assessment, the assessment organisation will collect personal information about you, such as your name and address, and information about your health and care needs.
- The information you provide will be recorded in your My Aged Care client record and will be used and disclosed by the assessment organisation, the Department of Health and Aged Care as well as any aged care providers while providing aged care services to you.
- If you provide the assessment organisation with personal information about other people such as your family or your support person, you confirm that you have obtained the other person's consent and that you have brought the contents of the privacy notice which is set out at [privacy notice web address](#) to their attention. Information about these other people will be included in your My Aged Care client record and will be handled in the same way as your own personal information - being for the purpose of providing aged care services to you.
- The information you provide may also be recorded in the assessment organisation's IT systems and will be used and disclosed by the assessment organisation for the purpose of determining your eligibility for and priority of an aged care assessment.
- The assessment organisation may share your personal information with other organisations to manage the support you need, for example, the Department of Health and Aged Care, and aged care or health providers.
- As we go through the aged care eligibility check process, please tell me if you do not want any of your information to be recorded. We can discuss how to manage this further.
- You can change your mind and withdraw your consent to participate in the aged care eligibility check process at any time. However, this will mean the assessment organisation cannot check your eligibility for aged care services and cannot conduct your aged care assessment. You will need to arrange your own aged care services.
- You can view the privacy notice which is set out at [privacy notice web address](#) as well as the My Aged Care privacy policy on the My Aged Care website at [myagedcare.gov.au](#) for more information on how we handle your personal information.
- Do we have your consent to assess the eligibility of Sandra SMITH for an aged care assessment?

Consent Obtained From *

The client

CONTINUE

CANCEL

6. If the client or their supporters choose to not give consent, the triage process must end. The Triage Delegate is required to provide a reason for refusal. Options provided are:

- the assessment is no longer required
- client's support person is not available
- client does not have the capacity to understand and communicate consent
- client's supporter withdraws consent
- client's supporter not available to give consent
- other reasons that can be specified further in a free text format.



The use of the **Other, please specify** value should be limited to rare and unusual situations that are not captured by existing values.

Consent for Triage

- record any detail or the circumstances regarding the handling of a client's personal information); and
- record any instructions relating to the assessor's conversation with the client (or supporter, decision-making supporter or guardian with respect to informed consent).

Script to be read.

In giving your consent for me, to check your eligibility for an aged care assessment you understand that:

- The assessment organisation will collect information that allows them to assess your eligibility for an aged care assessment.
- As part of the assessment, the assessment organisation will collect personal information about you, such as your name and address, and information about your health and care needs.
- The information you provide will be recorded in your My Aged Care client record and will be used and disclosed by the assessment organisation, the Department of Health and Aged Care as well as any aged care providers while providing aged care services to you.
- If you provide the assessment organisation with personal information about other people such as your family or your support person, you confirm that you have obtained the other person's consent and that you have brought the contents of the privacy notice which is set out at [privacy notice web address](#) to their attention. Information about these other people will be included in your My Aged Care client record and will be handled in the same way as your own personal information - being for the purpose of providing aged care services to you.
- The information you provide may also be recorded in the assessment organisation's IT systems and will be used and disclosed by the assessment organisation for the purpose of determining your eligibility for and priority of an aged care assessment.
- The assessment organisation may share your personal information with other organisations to manage the support you need, for example, the Department of Health and Aged Care, and aged care or health providers.
- As we go through the aged care eligibility check process, please tell me if you do not want any of your information to be recorded. We can discuss how to manage this further.
- You can change your mind and withdraw your consent to participate in the aged care eligibility check process at any time. However, this will mean the assessment organisation cannot check your eligibility for aged care services and cannot conduct your aged care assessment. You will need to arrange your own aged care services.
- You can view the privacy notice which is set out at [privacy notice web address](#) as well as the My Aged Care privacy policy on the My Aged Care website at [myagedcare.gov.au](#) for more information on how we handle your personal information.
- Do we have your consent to assess the eligibility of Sandra SMITH for an aged care assessment?

Consent Obtained From *

Consent was not given

Please select a reason for not providing the consent *

Select one

Select one

Assessment no longer required

Support person not available

Client unable to consent

Other, please specify

Revoked by supporter

Supporter not available

7. Once a reason for not providing consent is given, select **SAVE AND CLOSE**.

Consent Obtained From *

Consent was not given

Please select a reason for not providing the consent *

Revoked by supporter

 Please be advised that without capturing the consent, you cannot proceed any further with the Triage. If sure, then select 'Save and Close'. This will reject the referral.

SAVE AND CLOSE CANCEL

Triage Pre-population options

Triage Delegates will have the option to pre-populate responses from the client's previously finalised assessment, if available.

1. Select the **CONFIRM PRE-POPULATION** button to pre-populate the relevant previous screening/assessment. Select the **BLANK TRIAGE** button to begin the triage without pre-populated responses. Selecting the **CANCEL** button will navigate you back to the expanded view.

In exceptional cases when the client's previous referral was rejected after triage was completed, you will only be able to complete the triage with the pre-populated rejected referral.

Pre-populate or start a blank triage

By selecting 'Confirm Pre-population' the new Triage will be pre-populated with answers from the Screening completed on 5 April 2025.
Please select 'Blank Triage' if you want to start the new triage with no pre-population. Note that you will not be able to select to pre-populate the new triage after a blank triage has been created.

CONFIRM PRE-POPULATION
BLANK TRIAGE
CANCEL

2. Confirm the **Demographic details** of the client. Once confirmed, select **SAVE AND CONTINUE TO TRIAGE**.

Demographic details

All fields marked with an asterisk (*) are required.
Please check the following information for this client before starting the assessment. All fields must be completed before the assessment can begin.

☐ Remote Assessment ?

Personal details & Identification

First name *
Name

Middle name

Last name *
Surname

Address:
XX Street Name, SUBURB STATE POSTCODE
Contact details:
0000 000 000
Medicare number:
To change the above details,
[view the full client record.](#)

Background

Please enter the date of birth. If the date of birth is not known, please enter an estimated age in the Age field. This will then be used to automatically determine an approximate date of birth for the Client. *

Date of birth
DD/MM/YYYY

or
Estimated age
XX

Gender *

SAVE AND CONTINUE TO TRIAGE
CANCEL

- If the client identifies as an Aboriginal or Torres Strait Islander, they can request to have their assessment completed by a First Nations Assessment Organisation.

Demographic details

Country of birth *
Australia

Ethnicity *
Australian

Does the client identify as an Aboriginal or Torres Strait Islander?
Indigenous origin:
☐ No - Neither
☒ Yes - Aboriginal
☐ Yes - Torres Strait Islander
☐ Yes - Both
☐ Not stated/inadequately desc

Does the client prefer a First Nations Assessment Organisation for their assessment?
Yes

Preferred language *
English

Marital status *
Never married

Accommodation type *
PR Client Owns/Purchasing

SAVE AND CONTINUE TO TRIAGE CANCEL

The Triage Questionnaire

- Once the triage pre-population is completed, you will be directed to the Triage screen. Follow the prompts for the pre-populated or blank triage. All mandatory questions must be answered. There will be different mandatory questions under the following circumstances:
 - Triage is being conducted in a hospital setting and the client is already receiving aged care services
 - Triage is for a client on the End-of-life pathway.

Name SURNAME

Gender, XX years old, DD Month Year, AA00000001
XX Street Name, SUBURB, STATE POSTCODE

Save Triage

Triage

Clear Page Information

Triage

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

Date of Triage ⓘ DD/MM/YYYY ⓘ

Registration screen information collected from *

☒ Client	☐ Client's carer, family member and/or other	☐ Client's representative/supporter
☐ Client's General Practitioner	☐ Representative of service provider	☐ Health professional
☐ Aboriginal Liaison Officer	☐ Aged care connector and co-ordinator	☐ Care finder
☐ Via interpreter	☐ Agent	☐ Other

2. You must respond to the question **What type of needs assessor is recommended for client assessment**. The options available are:
- **Clinical:** comprehensive (clinical) assessment required
 - **Non-Clinical:** home support (non-clinical) assessment required
 - **Not eligible for assessment:** [not eligible for an aged care assessment](#).

Advice for assessment

What type of assessor is recommended for client assessment? *

Clinical	Non-Clinical	Not eligible for assessment
----------	--------------	-----------------------------

3. If the answer to the last question is **Clinical** or **Non-Clinical**, you must then record if the client is requiring an urgent assessment. The options that are available are:
- High urgency – Client is in Hospital
 - High urgency – Client is at immediate risk of harm or in a crisis situation (e.g. client carer incapacitated)
 - High urgency – Client from a vulnerable cohort and/or has complexity
 - Medium urgency – Client at home but needing services
 - Urgent assessment not required.

If the client requires an urgent assessment and is on the End-of-Life pathway, you must select a High Urgency option.

Require an urgent assessment? *

High urgency - Client is in hospital	High urgency - Client is at immediate risk of self harm or in a crisis situation (e.g. client carer incapacitated)	High urgency - Client from a vulnerable cohort and/or has complexity	Medium urgency - Client at home but needing services	Urgent assessment not required
--------------------------------------	--	---	--	--------------------------------

4. Select the **Priority of assessment**. It may be pre-filled from the referral record.

You should review the Assessment Priority and change it if client circumstances have recently changed. The priority should align with the previous question on the urgency of the assessment. If changing, then you must select a reason and enter a reason description.

Priority of assessment * ⓘ

Low	Medium	High
-----	--------	------

The below image shows that when the Priority of assessment changes from the original pre-filled value (for example from Low or High to Medium), the **Reason for changing priority** question appears.

The Reason for changing priority options available are:

- Changed circumstances
- Incorrect priority assigned
- Further functional decline
- Entered emergency care
- End-of-Life Pathway
- Other (please specify).

If you select **Other (please specify)**, the Reason description text box appears and you must enter the description.

Priority of assessment *

Low
Medium
High

Reason for changing priority *

Changed circumstances	Incorrect priority assigned	Further functional decline	Entered emergency care	End-of-Life Pathway	Other (please specify)
-----------------------	-----------------------------	----------------------------	------------------------	---------------------	------------------------

Reason description: *

Enter a description if Other was selected

41 / 255

! For End-of-Life Pathway, the priority of assessment during triage must be set to High. If the pre-filled value was not High, you must change it to **High**, then select **End-of-Life Pathway** as the Reason for changing priority.

Priority of assessment *

Low
Medium
High

Reason for changing priority *

Changed circumstances	Incorrect priority assigned	Further functional decline	Entered emergency care	End-of-Life Pathway	Other (please specify)
-----------------------	-----------------------------	----------------------------	------------------------	---------------------	------------------------

5. Specify if the client requires short-term urgent services, delivered via the [Commonwealth Home Support Program \(CHSP\)](#).

Does the client require urgent service provision (direct to service)? *

Yes
No

6. To save the recorded information but not complete the triage, select the **SAVE TRIAGE** button. This button is displayed on top of the Navigation pane as well as at the bottom of the page.

Top of the navigation pane

Home | Assessment Referrals | Triage

Mr Name SURNAME

Gender, XX years old, DD Month Year, AA00000001
XX Street Name, SUBURB, STATE POSTCODE
Prefers to speak [language]

Save Triage

Triage

Clear Page Information

Bottom of the page

Does the client require urgent service provision (direct to service)? *

Yes No

Outcome/advice for assessment notes

0 / 500

SAVE TRIAGE CANCEL TRIAGE - NO FURTHER ACTION REQUIRED

7. If the triage needs to be cancelled, select the **CANCEL TRIAGE – NO FURTHER ACTION REQUIRED** button located at the bottom of the triage page. Provide a reason for ending the triage and a comment at the pop up that appears. A list of options will be provided under **Reason for ending the triage**. Once the cancellation has been confirmed the referral will be rejected and you will be navigated back to the client summary page.

Cancel triage - no further action required

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

Reason for ending the triage *

Comment *

0 / 200

CANCEL TRIAGE **TAKE ME BACK TO THE TRIAGE**

8. To complete the triage, select the **COMPLETE TRIAGE** button at the bottom of the triage screen. Note that the **COMPLETE TRIAGE** button will not appear until all mandatory questions have been answered in the triage.

Does the client require urgent service provision (direct to service)? *

Yes **No**

Outcome/advice for assessment notes

0 / 500

COMPLETE TRIAGE **SAVE TRIAGE** **CANCEL TRIAGE - NO FURTHER ACTION REQUIRED**

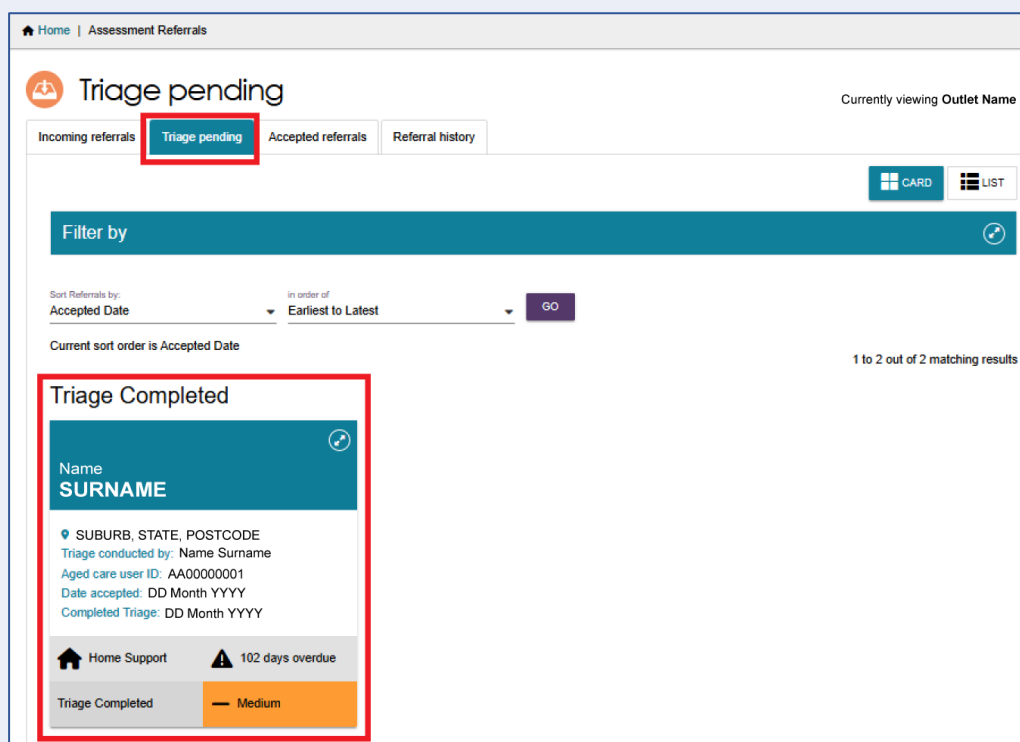
Once **COMPLETE TRIAGE** has been selected, a pop up will confirm that you would like to complete the triage. Select **COMPLETE TRIAGE** to continue.

Complete Triage

Once you select 'Complete Triage', you cannot modify any of the responses in this questionnaire. If sure, then please select 'Complete Triage', otherwise select 'Take me back to Triage'.

COMPLETE TRIAGE **TAKE ME BACK TO TRIAGE**

Once the client's triage has been completed, the referral for that client will remain on the **Triage pending** screen, under the **Triage Completed** heading.



9. The Triage Delegate will be able to expand the client card or listing, and view the following information and buttons:

- view full client record
- view client report.
- assign to assessor
- refer urgent services
- convert to home support assessment or comprehensive assessment
- reject
- transfer
- flag as End-of-Life.

Once the Complete triage action is completed, the above information will load as a pop-up screen automatically.

Name SURNAME

Assessment type

Home Support

DD/MM/YYYY

Assessment reason

VIEW ALL 1 CLIENT NOTES

Comments

Triage conducted by

Name Surname

Support plan

Triage Completed

Home Support Assessment

Triage Completed

Latest screening

DD Month Year

VIEW FULL CLIENT RECORD

VIEW CLIENT REPORT

ASSIGN TO ASSESSOR

REFER URGENT SERVICES

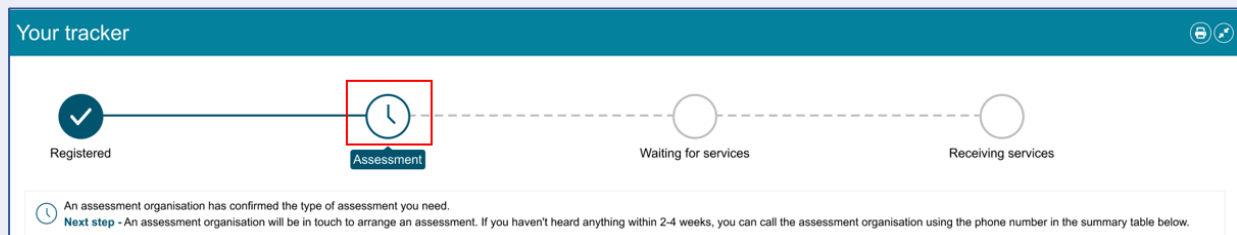
CONVERT TO COMPREHENSIVE ASSESSMENT

REJECT

TRANSFER

FLAG AS END-OF-LIFE

10. The Client Journey Tracker will show that triage has been completed – ‘An assessment organisation has confirmed the type of assessment you need’. It also shows that the client’s next step is that ‘an assessment organisation will be in touch to arrange an assessment’.



Triage completed - Not eligible for assessment

During the Triage process, if a client is deemed as **Not eligible for assessment**, the Triage Delegate must notify the client with a formal decision letter (Ineligibility letter).

Advice for assessment

What type of assessor is recommended for client assessment? *

Clinical
Non-Clinical
Not eligible for assessment

The triage delegate will be taken to the **ATTACHMENTS** tab on the Client record screen with the following message (as shown in the example) displayed at the bottom of the page.

You have found the applicant ineligible for an assessment.

Next steps are:

- 1) Generate the Ineligibility Letter using the GENERATE INELIGIBILITY LETTER button.
- 2) Change the generated letter as required to reflect the reason why you found them ineligible.
- 3) Send the changed letter to the applicant and upload it to their client record using the UPLOAD INELIGIBILITY LETTER button.

Refer to the [Generating and Uploading Ineligibility Letters](#) section on these next steps.

Viewing triage information

Triage Delegates and Team Leaders can view the client's triage information in the Client Summary page, from the client's card or listing. This is done by selecting the magnifying glass icon next to **Home Support Assessment** or **Comprehensive Assessment**.

Name SURNAME

Aged XX (DD Month Year), Gender

Referred from [referral source] on DD Month Year
Accepted on DD Month Year

Preferences
No preference was recorded

Assessment details

Assessment type Home Support

Assessment reason the client does not require ongoing support or has ongoing multiple needs that impact their ability to remain living in the community

Triage conducted by Name Surname

Support plan Triage Completed

Home Support Assessment Triage Completed

Latest screening DD Month Year

Completed triage due by DD Month Year

Client story
No client story was recorded

Comments

VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

ASSIGN TO ASSESSOR REFER URGENT SERVICES CONVERT TO COMPREHENSIVE ASSESSMENT REJECT TRANSFER

FLAG AS END OF LIFE

Generating and uploading Ineligibility Letters

Once a Triage Delegate decides that the client is [Not Eligible for assessment](#) (either before or during triage), they can then generate and/or upload the corresponding Ineligibility Letter. This is done in the Attachments tab of the client record.

1. From the client's expanded card or list view, select the **VIEW FULL CLIENT RECORD** button.

Card View

Preferences No preference was recorded		Completed triage due by DD Month Year	
Assessment details Assessment type Home Support Assessment reason the client does not require ongoing support or has ongoing multiple needs that impact their ability to remain living in the community Eligibility at screening Unlikely to be eligible Triage conducted by Name Surname		Client story No client story was recorded Comments	
Support plan	☒ Triage Completed ☐ Triage In Progress ☐ Triage Not Started		
Home Support Assessment	☒ Triage Completed ☐ Triage In Progress ☐ Triage Not Started		
Latest screening	DD Month YYYY		
VIEW FULL CLIENT RECORD VIEW CLIENT REPORT			
ASSIGN TO ASSESSOR REFER URGENT SERVICES CONVERT TO COMPREHENSIVE ASSESSMENT REJECT TRANSFER			
FLAG AS END OF LIFE			

List View

Name	Aged care user ID	Locality	Assessment type	Completed/cancelled date	Status	Priority
SURNAME Name	AA00000001	SUBURB, STATE, POSTCODE	Home Support	DD Month YYYY	Finalised	☒ Low
Aged XX (DD Month Year), Gender		Referred from Organisation name Outlet name on DD Month Year Accepted on DD Month Year				
Preferences No preference was recorded		Client story No client story was recorded				
Assessment details Assessment type Home Support Assessment reason Self-Referral Assessor Name Surname Triage conducted by Name Surname		Comments				
Support plan review	DD Month Year					
Support plan	DD Month Year					
Home Support Assessment	DD Month Year					
VIEW FULL CLIENT RECORD VIEW CLIENT REPORT						

- The Client summary page displays. Select the Attachments tab, then select the **GENERATE INELIGIBILITY LETTER** button.

Mr Name SURNAME
Gender, XX years old, DD Month Year, AA00000001
XX Street Name, SUBURB, STATE POSTCODE

Attachments

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

Attachments

ADD AN ATTACHMENT **GENERATE INELIGIBILITY LETTER** UPLOAD INELIGIBILITY LETTER

Assessment Attachments Other Attachments Correspondence

- This will redirect you to the My Reports section, which will contain the Ineligible for Assessment Letter template. Wait until the Status is **Ready** and select **View**. This will allow you to download the letter.

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

Assessor Portal My Dashboard Find a client Assessment referrals Review requests Organisation administration Residential Funding Referrals Find a service provider **Reports and documents** Tasks and notifications My Aged Care interactions Logout

Reports

My Reports

Name	Requested Date	Status
Name Surname Ineligible for Assessment Letter Template DD Month YYYY	DD Month YYYY	Ready - View

CLOSE

Update and change the generated letter template as required to reflect the reason why you have found the client ineligible during triage. Once you have completed the changes, save the letter template as a PDF or DOCX format. Select **CLOSE** to return to the client's profile.

! The system supports a maximum file size of 5MB, and does not accept Rich Text Format (RTF) files. Convert your files to PDF or DOCX formats before uploading.

- Upload the updated Ineligible for Assessment Letter via the **UPLOAD INELIGIBILITY LETTER** button.

Attachments

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

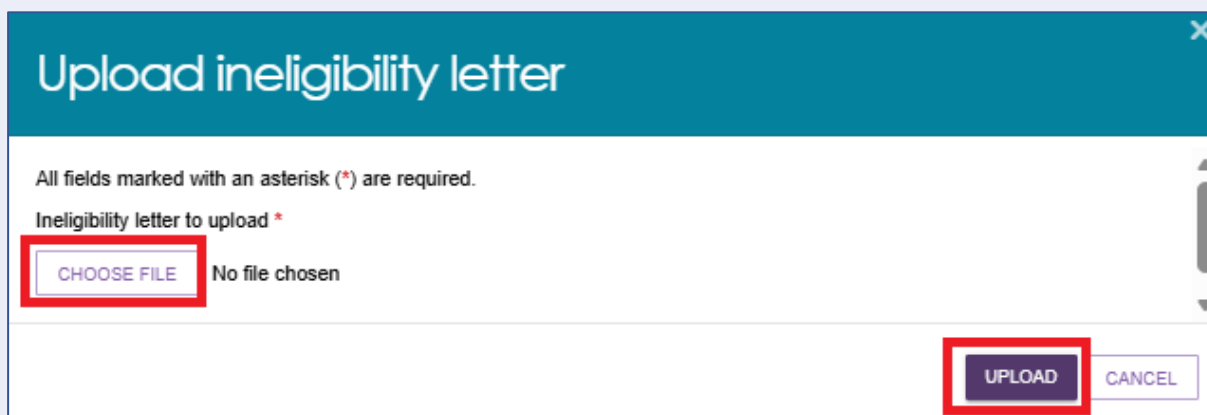
Attachments

ADD AN ATTACHMENT GENERATE INELIGIBILITY LETTER **UPLOAD INELIGIBILITY LETTER**

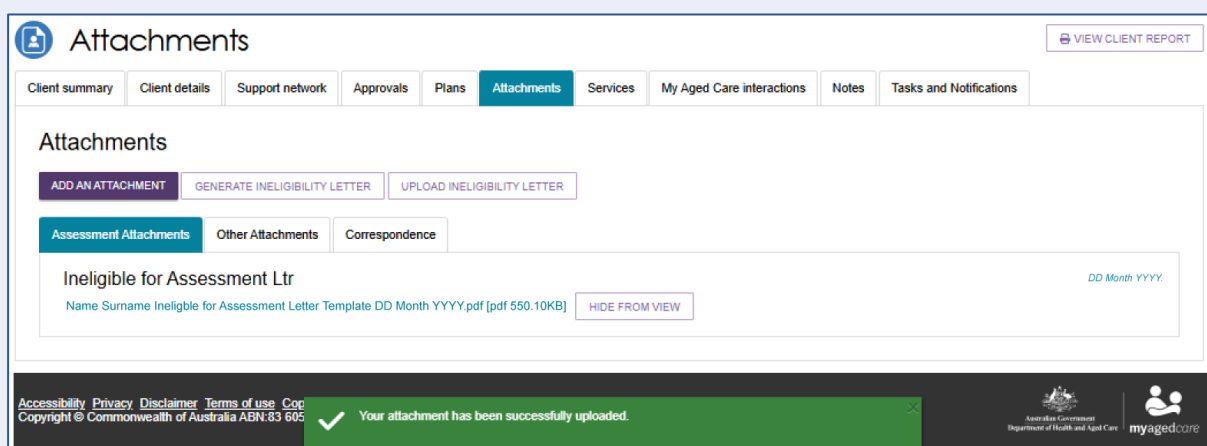
Assessment Attachments Other Attachments Correspondence

No attachments found to be displayed.

- The Upload ineligibility letter pop up will appear. Select **CHOOSE FILE** and select the file. Once selected, select **UPLOAD**.



- If the document is successfully uploaded, you will receive a green banner indicating the attachment has been successfully uploaded. The letter will appear in the **Assessment Attachments** tab.



Referring to Urgent Services

Triage Delegates can refer a client for short-term urgent services (delivered via the [Commonwealth Home Support Program \(CHSP\)](#) only) once an assessment referral has been accepted. This can occur before or after triage.

! Once the Triage Delegate has referred urgent services to the client, the [Decide Not Eligible](#) function no longer applies.

1. Select the card or listing for the client you are referring to for urgent services. Then select **REFER URGENT SERVICES**.

Example Card view

Name SURNAME

Aged XX (DD Month Year), Gender

Referred from [referral source] on DD Month Year
Accepted on DD Month Year

Preferences

No preference was recorded

Assessment details

Assessment type Home Support

Assessment reason the client does not require ongoing support or has ongoing multiple needs that impact their ability to remain living in the community

Triage conducted by Name Surname

Support plan

Home Support Assessment

Latest screening

Triage Completed

Triage Completed

DD Month Year

Completed triage due by DD Month Year

Client story

No client story was recorded

Comments

VIEW FULL CLIENT RECORD

VIEW CLIENT REPORT

ASSIGN TO ASSESSOR

REFER URGENT SERVICES

CONVERT TO COMPREHENSIVE ASSESSMENT

REJECT

TRANSFER

FLAG AS END OF LIFE

Example List View

SURNAME AA00000001

SUBURB, STATE, POSTCODE

Home Support

DD Month YYYY

Triage Not Started (Completed Triage)

DD/MM/YYYY (Due in XX days)

Low

Please confirm that Name Surname, DD Month Year, XX years, AA00000001 is the person you are conducting this assessment for. If the person details are incorrect, a privacy breach may occur.

Aged XX (DD Month Year), Gender

Referred from Organisation name on DD Month Year
Accepted on DD Month Year

Preferences

No preference was recorded

Completed triage due by DD Month Year

Client story

No client story was recorded

Comments

Assessment details

Assessment type Home Support

Assessment reason Self-Referral

Assessor Name Surname

Support plan review DD Month Year

Support plan DD Month Year

Home Support Assessment DD Month Year

VIEW FULL CLIENT RECORD

VIEW CLIENT REPORT

START TRIAGE

REASSIGN

REFER URGENT SERVICES

FLAG AS END-OF-LIFE

2. A pop up appears – ‘You should only provide urgent services if you have determined that the older person meets the eligibility criteria. If you continue, the DECIDE NOT ELIGIBLE button will no longer be available’. Select **CONFIRM** to continue.

Confirm refer urgent services

You should only provide urgent services if you have determined that the older person meets the eligibility criteria. If you continue the DECIDE NOT ELIGIBLE button will no longer be available.

CONFIRM

CANCEL

- The Triage Delegate will then be navigated to the **Goals & recommendations** tab under **Support Plan and services**.

Select **ADD A SERVICE RECOMMENDATION** to enter the urgent service required. For more information refer to [My Aged Care – Assessor Portal User Guide 7 – Completing a support plan and support plan 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

Current assessment type: Home Support Assessment

Client concerns and goals

ADD AREA OF CONCERN

No client concerns or goals.

Other recommendations

ADD A GENERAL RECOMMENDATION **ADD A SERVICE RECOMMENDATION**

There are no service recommendations for this client

CANCEL PENDING ASSESSMENT RETURN TO CLIENT

- When a client has been referred for urgent services, **Urgent Services Pending Triage** will be shown on the client's card or listing.

Name
SURNAME

Aged care user ID: AA00000002
Date accepted: DD Month YYYY
Completed Triage: DD Month YYYY

Home Support Due in 3 days

Urgent Services Pending Triage **Low**

Converting assessment type

Triage Delegates can convert a client's assessment from Comprehensive to Home Support, or Home Support to Comprehensive.

- Once triage has been completed and based on their clinical judgement, the Triage Delegate can convert the assessment by selecting the **CONVERT TO HOME SUPPORT ASSESSMENT** or **CONVERT TO COMPREHENSIVE ASSESSEMENT**.

Convert to Comprehensive Assessment

Name SURNAME

Aged XX (DD Month Year), Gender

Referred from [referral source] on DD Month Year
Accepted on DD Month Year

Preferences
No preference was recorded

Completed triage due by DD Month Year

Assessment details

Assessment type Home Support

Assessment reason the client does not require ongoing support or has ongoing multiple needs that impact their ability to remain living in the community

Client story
No client story was recorded

Comments

Triage conducted by Name Surname

Support plan Triage Completed

Home Support Assessment Triage Completed

Latest screening DD Month Year

VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

ASSIGN TO ASSESSOR REFER URGENT SERVICES **CONVERT TO COMPREHENSIVE ASSESSMENT** REJECT TRANSFER

FLAG AS END OF LIFE

Convert to Home Support Assessment

Name SURNAME

Assessment type Comprehensive

Assessment reason Direct Assessment - Needs respite care

Assessment setting Non-Hospital

Triage conducted by Name Surname

Support plan Triage Completed

Comprehensive Assessment Triage Completed

Latest screening DD Month Year

DD/MM/YYYY

VIEW ALL 4 CLIENT NOTES

Comments

Cohabitant details
Name SURNAME

VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

ASSIGN TO ASSESSOR REFER URGENT SERVICES **CONVERT TO HOME SUPPORT ASSESSMENT** REJECT TRANSFER

FLAG AS END-OF-LIFE

- When converting from a Comprehensive Assessment to a Home Support Assessment, Triage Delegate will need to enter the **Reason for change** as being **Low level care needs**.

Add a reason or comments. Then, select **YES, CONVERT ASSESSMENT**.

X

Convert to home support assessment

You are about to convert the assessment type from Comprehensive to Home Support for Name Surname.

Assessments should only be converted if the client's needs can be met by the level of care that can be provided through Home Support assessments (e.g. home support services).

Are you sure you want to proceed?

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

Reason for change *
Low level care needs

Reason or comments: *
0 / 255

YES, CONVERT ASSESSMENT
NO, CANCEL

- When converting from a Home Support Assessment to a Comprehensive Assessment, Triage Delegates will need to enter the **Reason for change** as being **High level care needs**.

Add a reason or comments. Then, select **YES, CONVERT ASSESSMENT**.

X

Convert to comprehensive assessment

You are about to convert the assessment type from Home Support to Comprehensive for Name Surname.

Assessments should only be converted if the client's needs exceed the level of care that can be provided through Home Support assessments (i.e., Home support services).

Are you sure you want to proceed?

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

Reason for change *
High level care needs

Reason or comments: *
0 / 255

YES, CONVERT ASSESSMENT
NO, CANCEL

Assigning an assessment referral to an assessor

Before a Triage Delegate assigns an assessment referral to an assessor, triage must be completed.

- Referrals that can be assigned are located in the **Triage pending** tab, under the **Triage Completed** heading. Expand the client card for the referral you wish to assign, then select **ASSIGN TO ASSESSOR**.

Triage pending Currently viewing Outlet name

Incoming referrals | **Triage pending** | Accepted referrals | Referral history

CARD LIST

Filter by

Sort Referrals by: Assessment Status | in order of In Order | **GO**

Current sort order is Assessment Status

1 to 3 out of 3 matching results

Triage Completed

Name SURNAME

SUBURB, STATE, POSTCODE
Triage conducted by: Name Surname
Aged care user ID: AA00000001
Date accepted: DD Month YYYY
Completed Triage: DD Month YYYY

Comprehensive **16 days overdue**

Triage Completed **High**

Name SURNAME

SUBURB, STATE, POSTCODE
Aged care user ID: AA00000002
Date accepted: DD Month YYYY
Completed Triage: DD Month YYYY

Comprehensive **16 days overdue**

Triage Completed **High**

Name SURNAME

Assessment reason Direct Assessment - Needs respite care

Assessment setting Non-Hospital

Triage conducted by Name Surname

Support plan **Triage Completed** DD/MM/YYYY

Comprehensive Assessment **Triage Completed**

Latest screening DD Month Year

VIEW ALL 4 CLIENT NOTES

Comments

Cohabitant details
Name SURNAME

VIEW FULL CLIENT RECORD **VIEW CLIENT REPORT**

ASSIGN TO ASSESSOR **REFER URGENT SERVICES** **CONVERT TO HOME SUPPORT ASSESSMENT**

REJECT **TRANSFER** **FLAG AS END-OF-LIFE**

2. The Triage Delegate can **Change assessment priority** before assigning the referral. Respond **Yes** or **No** to the question **Assign now**, and then choose the assessor.

You can also **SEARCH FOR A SPECIFIC ASSESSOR**. To proceed select **ASSIGN**.

If you do not wish to assign now, this referral will remain under the **Triage pending** tab, under the **Triage Completed** heading.

Assign this referral for Name Surname

Change assessment priority? ?
High

Comprehensive Assessment, currently unassigned.

Assign now ? ☒ Yes ☐ No

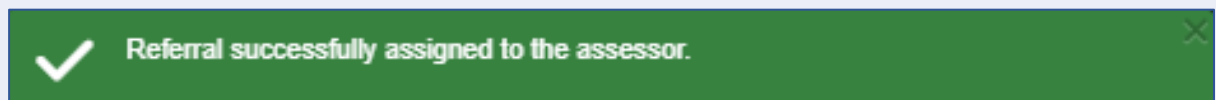
Assign to: *

- ☐ Name Surname (0 assessments assigned)
- ☐ Name Surname (8 assessments assigned)
- ☐ Name Surname (8 assessments assigned)
- ☐ Name Surname (13 assessments assigned)
- ☐ Name Surname (42 assessments assigned)

SEARCH FOR A SPECIFIC ASSESSOR

ASSIGN CANCEL

3. If successful, a green banner appears: 'Referral successfully assigned to the assessor'.



The assessment referral will appear in the **Accepted referrals** list, under the name of the assessor the referral was assigned to. The referral will also appear in the assigned assessor's **Current assessments** list for action.

Accepted referrals Currently viewing Outlet Name

Incoming referrals | Triage pending | **Accepted referrals** | Referral history

Filter by Expand filter

Sort Referrals by: **Priority** in order of **High to Low** GO

Current sort order is Priority 1 to 20 out of 107 matching results

Name Surname	Name Surname	Name Surname
Name Surname SUBURB, STATE, POSTCODE Aged care user ID: AA00000001 Date accepted: DD Month YYYY Completed Triage: DD Month YYYY Comprehensive 16 days overdue Triage Completed High	Name Surname SUBURB, STATE, POSTCODE Aged care user ID: AA00000002 Date accepted: DD Month YYYY Completed Triage: DD Month YYYY Comprehensive 63 days overdue Triage Completed High	Name Surname SUBURB, STATE, POSTCODE Aged care user ID: AA00000003 Date accepted: DD Month YYYY Completed Support Plan: DD Month YYYY Comprehensive 2 days overdue Assessment In Progress Medium

Rejecting an assessment referral

If an outlet is unable to accept an assessment referral and cannot transfer it, a Team Leader can reject the referral. Referrals may also be rejected after acceptance, but only before the assessment has commenced.

1. Select **REJECT** on the expanded card view or list view of the referral information.

Name SURNAME

Preferences
No preference was recorded

Assessment details
 Assessment type: Comprehensive
 Assessment reason:
 Assessment setting: Non-Hospital
 Assessor: Name Surname
 Triage conducted by: Name Surname

Completed triage due by DD Month Year

Client story
 DD/MM/YYYY
 DD/MM/YYYY

Comprehensive Assessment Triage Completed

Latest screening DD Month Year

[VIEW ALL 7 CLIENT NOTES](#)

Comments

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

[REASSIGN](#) **[REJECT](#)** [TRANSFER](#)

2. Select a reason for rejecting the assessment referral. Optionally you can enter the rejection reason. If you selected 'Other', then the rejection reason is mandatory.

Then, select **REJECT**. The rejected referral will automatically be sent to My Aged Care to action.

! The use of the 'Other' value when rejecting referrals should be limited to rare and unusual situations that are not captured by existing values. If an existing value primarily captures the nature of the rejection reason, please utilise that option. The free text field will be available for further information for any rejection reason selected.

! An older Aboriginal and/or Torres Strait Islander person should not be rejected based on a client's preference (e.g. under the reason "Client prefers an FNAO") unless it is a last resort. A transfer prior to the assessment is preferable to a rejection. For more information please refer to the [My Aged Care Assessment Manual](#).

×

Reject this referral for Name Surname

Select a reason:*

☐ Client/family/rep unavailable

☐ Duplicate Client Record

☐ Interpreter not available

☐ Unable to contact client

☐ Outside assessment region

☐ Assessment no longer required

☐ Care approval meets needs

☐ Client medically unstable

☐ Client age - alternate options

☐ Client does not consent

☐ Client deceased

☐ Client prefers an FNAO

☐ Clinical staff not available

☐ Hospital assessment required

☐ Client prefer later assessment

☐ Other

Rejection reason:

0 / 500

REJECT

CANCEL

Rejecting an assessment referral with the reason of Client deceased

! Rejecting an assessment referral with the reason of **Client deceased** will change the client's status to **Deceased** and make the client record read-only. Any unaccepted service referrals will be recalled, services in place will be ceased, assessments will be cancelled and the client's access to the client portal will be revoked. My Aged Care will not send correspondence to the client or their supporters after the status is changed to **Deceased**.

1. If a client is deceased during an assessment referral period, team leaders will need to provide the following information:
 - who, when and how you were informed that this person is deceased e.g. "Mrs Smith rang to inform us that Mr Smith has passed away on Saturday"
 - date of death (if known)
 - attachments (e.g. death certificate, hospital discharge documents).

Reject this referral for Name Surname

☐ Interpreter not available
☐ Unable to contact client
☐ Outside assessment region
☐ Assessment no longer required
☐ Care approval meets needs
☐ Client medically unstable
☐ Client age - alternate options
☐ Client does not consent
☒ **Client deceased**
☐ Client prefers an FNAO
☐ Clinical staff not available
☐ Hospital assessment required
☐ Client prefer later assessment
☐ Other

You are about to notify the department that Name Surname has passed away. Their record will become read only. You will still be able to finalise outstanding assessments and support plan reviews, and add notes and attachments.

Please supply the following information:

Who, when and how were you informed that this person is deceased? *

0 / 500

Date of death (if known)

dd/mm/yyyy

Add Attachments

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 (if available)

Choose a file...

Rejection reason:

0 / 500

REJECT

CANCEL

- When a client is marked as deceased, if they have an in-progress assessment or have commenced services, a notification will be sent to the associated assessor in the assessor portal advising the assessor to close or finalise the in-progress tasks.

Flagging the assessment as End-of-Life Pathway

If the client has provided the Triage Delegate with a completed End-of-Life Pathway Form, they can flag the assessment referral to be considered for the End-of-Life Pathway, which is given a high priority. This process can be completed before and after triage is completed.

- Select the **Flag as End-of-Life** button in the client's card or list view.

Name SURNAME

Aged XX (DD Month Year), Gender

Referred from [assessment organisation] on DD Month Year
Accepted on DD Month Year

Preferences
No preference was recorded

Assessment details
Assessment type: Home Support
Assessment reason: Self-Referral
Assessor: Name Surname

Support plan
Home Support Assessment: Pending

Completed triage due by DD Month Year
Client story: No client story was recorded
Comments

VIEW FULL CLIENT RECORD | VIEW CLIENT REPORT

START TRIAGE | REASSIGN | REFER URGENT SERVICES | CANCEL PENDING ASSESSMENT

TRANSFER | **FLAG AS END-OF-LIFE**

- Review the provided documents according to the rules of the [My Aged Care Assessment Manual](#). Carefully examine the End-of-Life Pathway Form and any supporting documentation submitted by the client. Select the most appropriate value for verifying the End-of-Life Pathway Form and supporting documents.

Flag referral as End-of-Life for Name Surname

All fields marked with an asterisk (*) are required.
Referrals flagged for the End-of-Life Pathway are given high priority.

End-of-Life form verification ?
No selection made

No selection made
Document reviewed - valid
Document reviewed - pending
Document reviewed - not valid

FLAG AS END-OF-LIFE | CANCEL

- ! It is crucial to review and upload the End-of-Life Pathway Form and any supporting documentation to ensure the client meets the eligibility requirements under the End-of-Life Pathway. If the documentation is incomplete or missing, select **Document reviewed – pending**.

3. Complete the Details field by entering the necessary details, then select the **UPLOAD ATTACHMENT** button to attach the form.

4. Select the **CHOOSE FILE** button to select the form from your device.

Fill in the Attachment type, Attachment name, and Attachment description fields, and then select the **UPLOAD** button to upload the form.

5. A confirmation screen will appear. Review or delete the attachment or details if necessary, and then select the **FLAG AS END-OF-LIFE** button to complete the process.

Flag referral as End-of-Life for Name Surname

All fields marked with an asterisk (*) are required.
Referrals flagged for the End-of-Life Pathway are given high priority.

End-of-Life form verification (?)
Document reviewed - valid

Details
Insert details here

19 / 255

UPLOAD ATTACHMENT

Name Surname End-Of-Life Form DD MMM YYYY (End-of-Life Form) [pdf] 17 September 2026

27.27KB

Completed by Dr Name Surname

FLAG AS END-OF-LIFE CANCEL

6. Once completed you will receive a green confirmation banner at the bottom of the screen, and the assessment referral card will show the End-of-Life Pathway symbol.



End-of-Life Pathway

Triage Completed

Name
SURNAME

Triage conducted by: Name Surname
Aged care user ID: AA00000001
Date accepted: DD Month YYYY
Completed Triage: DD Month YYYY

Home Support Due today

Triage Completed **High**

Accessibility Privacy Disclaimer Terms of use Copyright
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✓ You have successfully flagged Name Surname for the End-of-Life Pathway.

Transferring an assessment referral to another outlet or organisation

Only incoming, accepted or triaged referrals may be transferred to another outlet or organisation. A referral can only be transferred to another organisation or outlet once.

Follow these steps to transfer assessment referrals to an alternative assessment organisation or outlet:

- !** Before transferring a referral, the Team leader must ensure:
- The client understands why their referral is being transferred and consents to the transfer of the referral to the new assessment organisation.
 - They have contacted the assessment organisation that will be receiving the client referral to confirm that they will accept the referral.

A referral should not be transferred before confirmation has been obtained that it will be accepted by the receiving assessment organisation.

1. From either the **Incoming referrals**, **Triage pending** or **Accepted referrals** tab of the **Assessment Referrals** tile, select the client's card or listing, and then select **TRANSFER** in the expanded view.

Card view example

Name SURNAME

Preferences

No preference was recorded

Assessment details

Assessment type

Comprehensive

Assessment reason

the client has needs that exceed a basic support programme

Assessment setting

Non-Hospital

Assessor

Name Surname

Triage conducted by

Name Surname

Comprehensive Assessment

Triage Completed

DD Month Year

Latest screening

DD Month Year

Accepted on DD Month Year

Completed triage due by DD Month Year

Client story

No client story was recorded

Comments

VIEW FULL CLIENT RECORD

VIEW CLIENT REPORT

REASSIGN

REJECT

TRANSFER

List view example

Name	Aged care user ID	Locality	Assessment type	Accepted date	Status
 SURNAME Name	AA00000001	SUBURB, STATE, POSTCODE	Comprehensive	DD/MM/YYYY	Triage Completed (Comp)
Aged XX (DD Month Year), Gender, Identifies as: Aboriginal Preferences No preference was recorded Assessment details Assessment type: Comprehensive Assessment reason: the client has needs that exceed a basic support programme Assessment setting: Non-Hospital  Assessor: Name Surname Triage conducted by: Name Surname Comprehensive Assessment: ● Triage Completed  Latest screening: DD Month Year 			Referred from [referral source] on DD Month Year Accepted on DD Month Year Completed triage due by DD Month Year Client story No client story was recorded Comments		
VIEW FULL CLIENT RECORD		VIEW CLIENT REPORT			
REASSIGN		REJECT		TRANSFER	

2. The following warning will appear when you select **TRANSFER**.



Before you transfer, contact the Assessment Organisation you want to refer the client to. Please provide as much information as possible in the comments box below to assist the receiving organisation. Please note, a referral can only be transferred once. Please ensure that you have client consent for assessment type before transferring.

3. The Transfer this referral for [Client name] pop up appears. Under 'What type of assessment does the client require?', select either **Home Support** or **Comprehensive Assessment**.

For Comprehensive assessment, it will provide an Assessment setting of **Hospital** or **Non-Hospital**. If Home Support Assessment is selected, this assessment setting will disappear.

Once these have been selected, select the button **ADD ADDRESS** to search the address of the assessment organisation.

Comprehensive Assessment example

Transfer this referral for Name Surname

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

What type of assessment does the client require? *

Comprehensive Assessment

Assessment setting: ?

☒ Hospital

☐ Non-Hospital

Search for Assessment Organisation: *

☐ Use the client's address

Client address

 1 Street Name, SUBURB STATE Postcode

☒ Enter a Hospital address

ADD ADDRESS

SEARCH

TRANSFER CANCEL

Home Support Assessment example

Transfer this referral for Name Surname

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

What type of assessment does the client require? *

Home Support Assessment

Search for Assessment Organisation: *

☒ Use the client's address

Client address

 1 Street Name, SUBURB STATE Postcode

☐ Enter an alternative assessment address

SEARCH

TRANSFER CANCEL

4. The **Add address** pop up will appear. Enter the assessment organisation's address, then select **VALIDATE THIS ADDRESS**.

Below a list of addresses will be provided. Select the most relevant address.

To finalise the address, select **SAVE ADDRESS**.

Add address

Hospital name

Street number e.g. 201 or 34-36

XX

Street name

Street name

Street type

Street type

Enter Suburb and postcode and select from the list below *

SUBURB STATE Postcode

SUBURB IS NOT LISTED, CLICK HERE

Country *

Country

VALIDATE THIS ADDRESS

Special instructions (up to 100 characters)

SAVE ADDRESS

CANCEL

5. If the assessment setting is **non-hospital**, you can either use the client's address or add an alternative assessment address depending on the client's or their registered supporter guardian's preference. Select the appropriate assessment organisation for referral transfer and then select the reason from the drop-down menu.

If the transfer reason is **OTHER**, you will be prompted to add a comment explaining the reason.

- ! If the client has preference to be assessed by a First Nations Assessment Organisation a yellow banner will be displayed advising so.



You are assigning the assessment referral of a client who has preference for the assessment to be done by First Nations Assessment Organisation.

Transfer this referral for Name Surname

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

What type of assessment does the client require? *

Home Support Assessment

Search for Assessment Organisation: *

☒ Use the client's address

Client address

1 Street Name, SUBURB STATE Postcode

☐ Enter an alternative assessment address

SEARCH

Select Assessment Organisation*

☐ Organisation name - Region - SUBURB, Ph 00 0000 0000

☐ Organisation name - Region - SUBURB, Ph 00 0000 0000

☐ Organisation name - Region - SUBURB, Ph 00 0000 0000

☐ Organisation name - Region - SUBURB, Ph 00 0000 0000

☐ Organisation name - Region - SUBURB, Ph 00 0000 0000

Select a reason for transferring this client * ?

Comments:

0 / 255

TRANSFER

CANCEL

Select a reason for transferring this client * ?

Select one

Select one

Insufficient capacity

Outside assessment org region

Client change in circumstances

Remote Assessment

Clinical staff not available

Other

6. Once the **TRANSFER** button is selected, a green banner will be displayed confirming the transfer has been completed successfully.

✓ Name Surname Referral has been transferred successfully.

Transferring client records from inactive outlets

Departmental staff can transfer client records linked to an inactive outlet to an active outlet in the same assessment organisation, or to another assessment organisation.

Future Support Plan Review requests or new assessment referrals will be issued to the active outlet. Care extension requests transferred to the active outlet will appear as 'unassigned' in the delegate queue.

The assessors and the contact centre will see a note of the transfer in the My Aged Care client record. The client's online account includes a notification of the transfer.

In the assessor portal, the notification of the transfer can be seen in the **Notes** tab of the client record.

Mr Name SURNAME
Gender: XX years old, DO Month Year AA0000001
XX Street Name, SUBURB, STATE, POST CODE

Primary contact: Name Surname (Role)
No support relationships recorded

Notes

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

Filter by

Sort by: Please select GO

ADD A NOTE

Date created	End date	Note type	Description	Created by organisation	Created by outlet	Note status
DDMM/YYYY		Referral Note	This client record has now been transferred from Indra Combined Assessment to Indra Combineone Assessment on DDMM/YYYY	System	System	Active
DDMM/YYYY		Other	Description	System	System	Active
DDMM/YYYY		Other	Description	System	System	Active
DDMM/YYYY		Other	Description	System	System	Active
DDMM/YYYY		Other	Description	System	System	Active

Residential Funding Referrals

The Residential Funding Referrals tile is available to accept any residential funding referrals.

1800 836 799 Mon-Fri 8am - 6pm Sat 10am - 2pm Welcome Name

Assessor Portal Log

Welcome Name

My Dashboard

Residential Funding Referrals

Find a service provider

Reports and documents

Aged Care Assessor app

Tasks and notifications

My Aged Care Interactions

A clinical aged care needs assessor (clinical needs assessor) will have access to the **Current Work** and **Recent Work** tabs.

The **Current Work** tab contains Residential Respite Assessments that are assigned to you.

Home | Residential Funding Referrals

Current work Currently viewing Organisation/ Outlet Name

Current work Recent work

Filter by

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

Current sort order is Last name 1 to 2 out of 2 matching results

Organisation name
SUBURB, STATE, POSTCODE

Name
SURNAME
Aged XX (DD Month Year), Gender

Aged care user ID: AA00000001
Care type: Residential Permanent
Date issued: DD Month YYYY
Complete assessment due by: DD Month YYYY

High 322 days overdue

The **Recent Work** tile contains Residential Respite Assessments that you have completed in the past 2 years.

Home | Residential Funding Referrals

Recent work Currently viewing Organisation/ Outlet Name

Current work **Recent work**

Filter by

Sort by: Date Closed In order of: Earliest to Latest GO

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

Name
SURNAME
Aged XX (DD Month Year), Gender

Aged care user ID: AA00000001
Care type: Residential Respite
Date closed: DD Month YYYY

☒ Self-referral ☐ Rejected - transferred

Name
SURNAME
Aged XX (DD Month Year), Gender

Aged care user ID: AA00000001
Care type: Residential Respite
Date closed: DD Month YYYY

☒ Self-referral ☒ Finalised

Name
SURNAME
Aged XX (DD Month Year), Gender

Aged care user ID: AA00000001
Care type: Residential Respite
Date closed: DD Month YYYY

☒ Self-referral ☐ Rejected - entered a residential facility

Filters can be applied to both the Current and Recent work tabs.

Home | Residential Funding Referrals

Recent work

Currently viewing Assessment Organisation

Current work Recent work

CARD LIST

Filter by

Facility name Last name Aged Care user ID

ADVANCED SEARCH CLEAR FILTERS

FILTER CLEAR

Sort by: Last Name in order of: Alphabetical (A-Z) GO

Current sort order is Last Name
No records returned

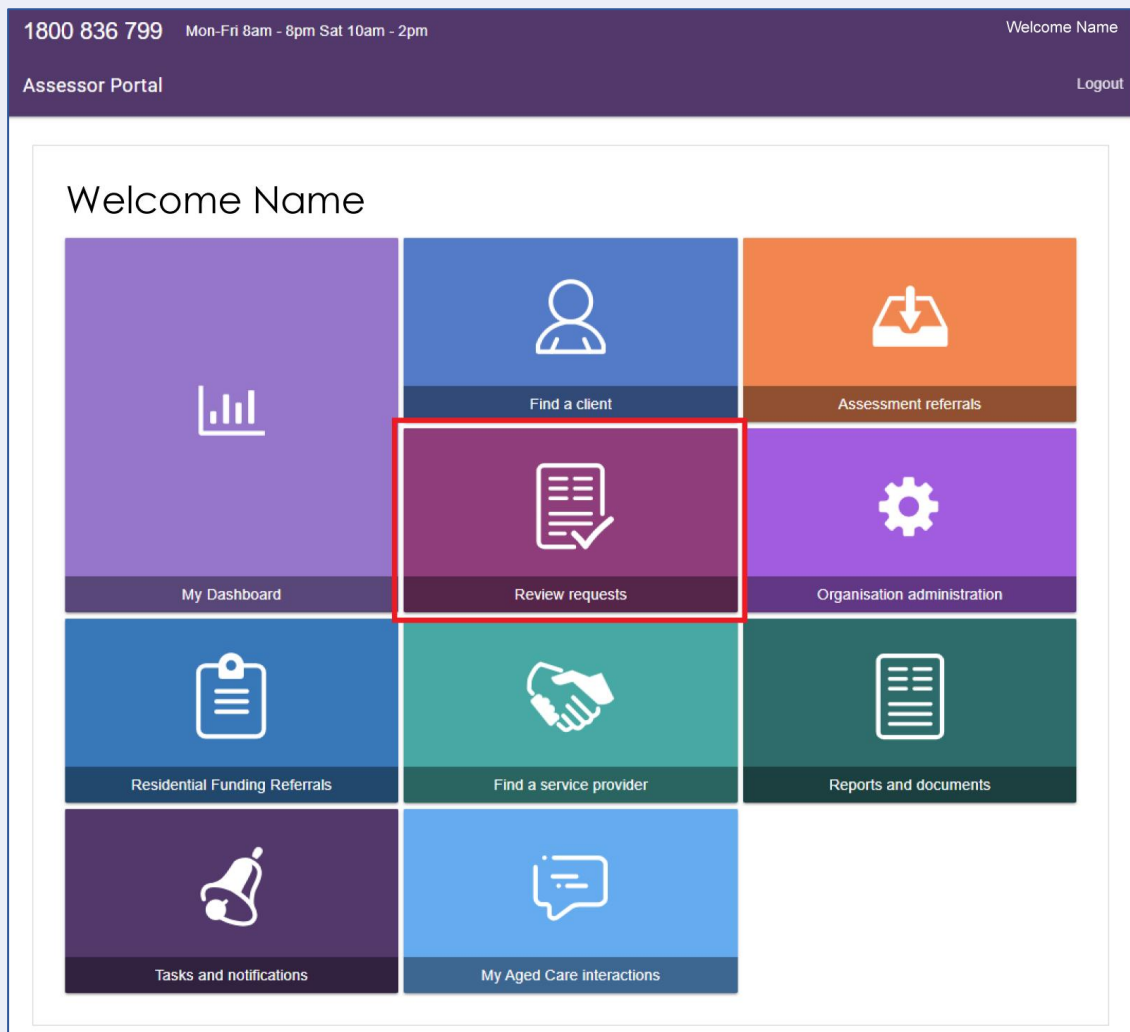
For more information on self-referring a client and starting a Residential Respite Assessment, please refer to the [Aged Care Assessor Application User Guide](#).

Support Plan Reviews

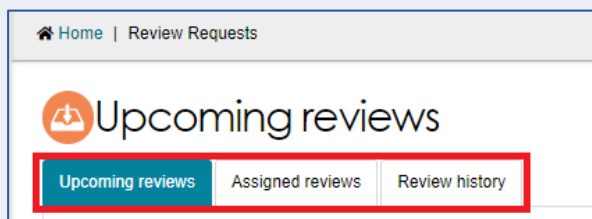
! For a reassessment following a Support Plan Review, triage will be simplified. Assessors can ask the triage questions themselves, with the Triage Delegate only contacting the client if information is missing.

For more information about conducting a Support Plan Review for Support at Home clients, refer to [My Aged Care – Assessor Portal User Guide 7 – Completing a support plan and support plan review](#).

Team leaders can manage Support Plan Reviews via the **Review requests** tile on the assessor portal home page.



In the **Review requests** section, team leaders can view **Upcoming reviews**, **Assigned reviews** and **Review history**.



In the **Upcoming reviews** tab team leaders can:

- view scheduled reviews
- view reviews requested by service providers
- assign reviews to assessors
- change review priority
- cancel reviews.

In the **Assigned reviews** tab team leaders can reassign reviews to different assessors.

In the **Review history** tab team leaders can view a history of completed and cancelled reviews.

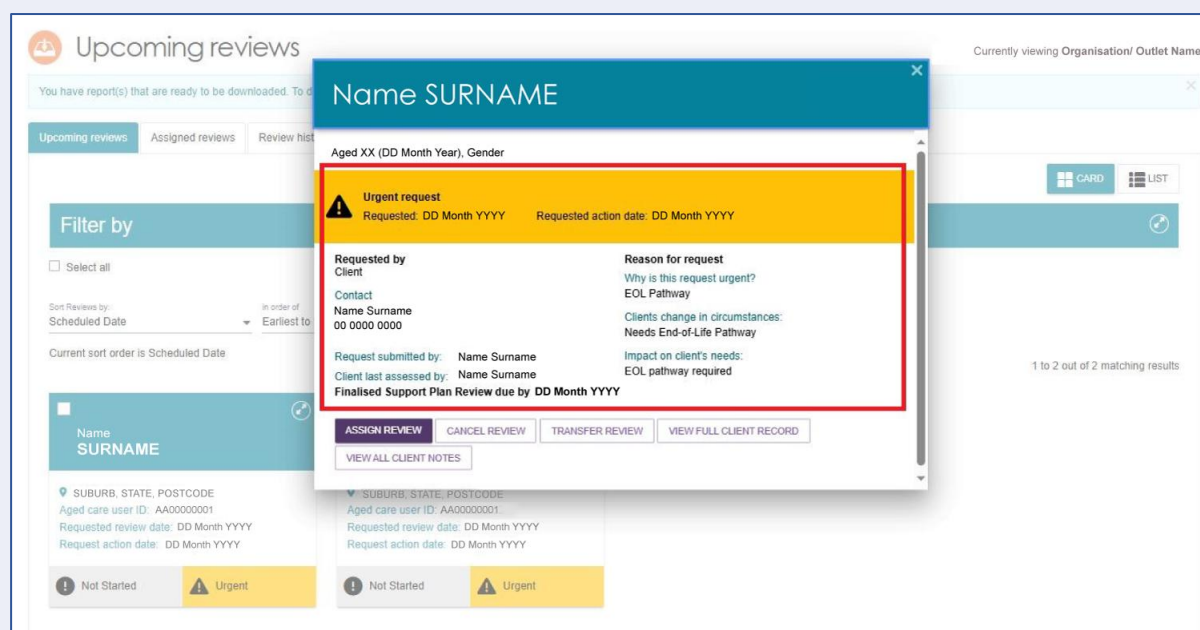
Viewing Support Plan Reviews

A Support Plan Review request will contain the following information:

- The person/organisation requesting the Support Plan Review
- The assessor who last conducted the assessment
- The urgency for the review to be completed
- Reasons for request including:
 - Client's change in circumstances
 - Impact on client's needs
 - Primary reason for request
 - Services client is currently receiving
 - Options explored to increase the client's current support.

! Upon receiving an urgent review request, the Team Leader must select the double arrow icon to expand the referral card to verify whether it relates to **the End-of-Life pathway** and prioritise it accordingly. Please refer to the 'Identification of End-of-Life Clients' via Qlik guidance on the Assessment Hub.

The following image shows an example of an Urgent Support Plan Request because the client is on the End-Of-Life Pathway.



A banner will be displayed on the request if additional attachments have been added to the client's record as part of the Support Plan Review request.

The screenshot shows the 'Upcoming reviews' page. A modal window for 'Name SURNAME' is open, displaying client details and review information. The modal includes a red box around the 'ASSIGN REVIEW' button. The background page shows a list of reviews with filters and sorting options.

Upcoming reviews

You have report(s) that are ready to be downloaded. To download, click on the download icon.

Upcoming reviews Assigned reviews Review history

Filter by

☐ Select all

Sort Reviews by: Scheduled Date in order of: Earliest to Latest

Current sort order is Scheduled Date

Name SURNAME

Suburb, State, Postcode
Aged care user ID: AA0000001
Requested review date: DD Month YYYY
Request action date: DD Month YYYY

Modal Window:

Name SURNAME

Aged XX (DD Month Year), Gender

Urgent request
Requested: DD Month YYYY Requested action date: DD Month YYYY

Requested by Client
Contact Name Surname 00 0000 0000

Reason for request
Why is this request urgent?
EOL Pathway
Clients change in circumstances:
Needs End-of-Life Pathway
Impact on client's needs:
EOL pathway required

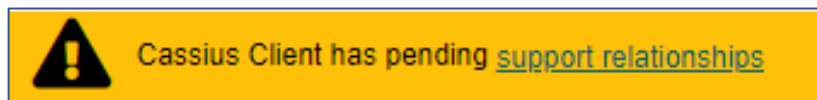
Request submitted by: Name Surname
Client last assessed by: Name Surname
Finalised Support Plan Review due by DD Month YYYY

ASSIGN REVIEW CANCEL REVIEW TRANSFER REVIEW VIEW FULL CLIENT RECORD

VIEW ALL CLIENT NOTES

1 to 2 out of 2 matching results

! If the client has pending support relationships, a banner will be displayed on the review. Team leaders are able to confirm pending support relationships for clients, this process is described in [My Aged Care – Assessor Portal User Guide 2 – Registering support people and adding relationships](#).



Team leaders can sort, and filter Support Plan Reviews based on several categories.

The screenshot shows the 'Assigned reviews' page. The 'Filter by' dropdown menu is open, showing a list of sorting options. The 'Urgency' option is highlighted with a red box.

Assigned reviews

Upcoming reviews Assigned reviews Review history

Filter by

Sort Reviews by: Scheduled Date in order of: Earliest to Latest **GO**

Filter by dropdown options:

- Last Name
- First Name
- Aged Care User ID
- Suburb
- State
- PostCode
- Scheduled Date
- Actual Date
- Assessment Status
- Review Status
- Urgency**

Assigning a Support Plan Review

Team leaders will only be able to assign the Support Plan Review request that has the parent assessment type as Home Support assessment to non-clinical aged care needs assessors (non-clinical assessors) within the outlet. If the client is undergoing support, the team leader contacts the assessor to determine whether to end the support period or cancel the review.

Name SURNAME


Urgent request
Requested: DD Month YYYY Requested action date: DD Month YYYY


Files were attached to this request [View client attachments](#)


Undergoing reablement

Requested by
Aged Care Service Provider
Provider name

Contact
Name Surname
Name@email.com.au

Reason for request
Why is this request urgent?
requires urgent attention

Clients change in circumstances:
Risk of vulnerability

Impact on client's needs:
Increasing in care needs

Primary reason for request:
Request for additional CHSP services for clients who are in receipt of HCP
Clients on Level 1 or 2: where budget is allocated, client can access
additional short-term or episodic Allied Health and Therapy or Nursing
services from CHSP.

Services client is currently receiving:
Client is currently receiving domestic assistance at home, to support her
day to day activities

Request submitted by: Name Surname
Client last assessed by: Name Surname
Assessment Status: Undergoing Support

CANCEL REVIEW

VIEW FULL CLIENT RECORD

VIEW ALL CLIENT NOTES

Follow these steps to assign a Support Plan Review:

1. Navigate to the **Upcoming reviews** tab and select **ASSIGN REVIEW** on the expanded client card.

Upcoming reviews

Upcoming reviews Assigned reviews Review history

Filter by

☐ Select all
Sort Reviews by: Scheduled Date In order of: Earliest to Latest
Current sort order is Scheduled Date

Name SURNAME

SUBURB, STATE, POSTCODE
Aged care user ID:
Requested review date: DD Month YYYY

Name SURNAME
Aged XX (DD Month Year), Gender
Requested by Representative
Contact Name Surname 00 0000 0000
Request submitted by: Name Surname
Client last assessed by: Name Surname

ASSIGN REVIEW CANCEL REVIEW TRANSFER REVIEW VIEW FULL CLIENT RECORD VIEW ALL CLIENT NOTES

- Before assigning to an assessor, you can change the Support Plan Review priority. Select an assessor to assign the Support Plan Review to and select **ASSIGN**.

Assign this review for Name Surname

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

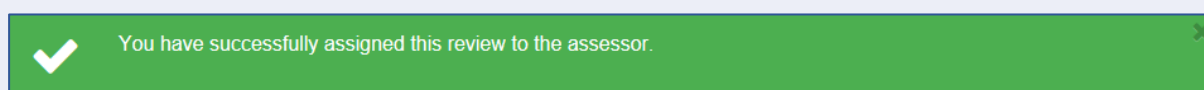
Change support plan review priority?

Assign to: *

- ☐ Name Surname (3 assessments and 0 reviews assigned)
- ☐ Name Surname (0 assessments and 0 reviews assigned)
- ☐ Name Surname (0 assessments and 1 reviews assigned)
- ☐ Name Surname (1 assessments and 0 reviews assigned)
- ☐ Name Surname (0 assessments and 0 reviews assigned)
- ☐ Name Surname (9 assessments and 0 reviews assigned)
- ☐ Name Surname (4 assessments and 1 reviews assigned)
- ☐ Name Surname (0 assessments and 0 reviews assigned)
- ☐ Name Surname (2 assessments and 0 reviews assigned)
- ☐ Name Surname (0 assessments and 0 reviews assigned)
- ☐ Name Surname (5 assessments and 0 reviews assigned)
- ☐ Name Surname (2 assessments and 1 reviews assigned)

ASSIGN CANCEL

- Once assigned, a banner will appear on the bottom of your screen.

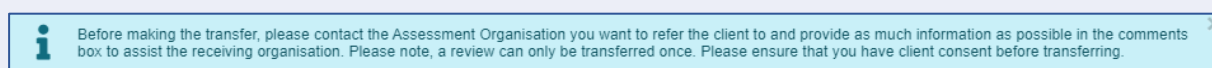


- The Support Plan Review will now appear in the **Assigned reviews** tab. Assigned reviews will also appear in the **Current reviews** tab of the assessor the review was assigned to.

Transferring a Support Plan Review

Team leaders can transfer Support Plan Reviews to other assessment organisations.

- To begin transferring a Support Plan Review, go to **Upcoming reviews** and select the client card you wish to transfer for the Support Plan Review. Select **TRANSFER REVIEW**.



Upcoming reviews

Upcoming reviews Assigned reviews Review history

Filter by

☐ Select all

Sort Reviews by: Scheduled Date

In order of: Earliest to Latest

Current sort order is Scheduled Date

Name SURNAME

SUBURB, STATE, POSTCODE

Aged care user ID:

Requested review date: DD Month YYYY

Name SURNAME

Aged XX (DD Month Year), Gender

Requested by Representative

Contact Name Surname 00 0000 0000

Reason for request

Clients change in circumstances:

Change in care needs

Impact on client's needs:

Description of impact on client's needs

Request submitted by: Name Surname

Client last assessed by: Name Surname

ASSIGN REVIEW CANCEL REVIEW TRANSFER REVIEW VIEW FULL CLIENT RECORD VIEW ALL CLIENT NOTES

- You will need to enter a **What is the reason for the transfer** and search and select the Assessment Organisation which the Support Plan Review will be transferred to. Once the reason for transfer and organisation has been selected, select **TRANSFER**.

Home | Review Requests | Transfer

Transfer this support plan review for Name Surname

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

What is the reason for transfer? *

Client has relocated

Comments:

Search for Assessment Organisation: *

☒ Use the client's address

Client address

1 Street Name, SUBURB STATE Postcode

☐ Enter an alternative assessment address

SEARCH

TRANSFER CANCEL

Reassigning a Support Plan Review

Follow these steps to reassign a Support Plan Review:

- From the **Assigned reviews** tab, expand the client card using the expand icon and select **REASSIGN REVIEW** on the Support Plan Review to be reassigned or unassigned.

Name SURNAME

Aged XX (DD Month Year), Gender

Requested by
Representative

Contact
Name Surname
00 0000 0000
Name@email.com.au

Reason for request

Clients change in circumstances:
Change in care needs

Impact on client's needs:
Description of impact on client's needs

Request submitted by: Name Surname

Client last assessed by: Name Surname

Assigned to: Name Surname

Finalised Support Plan Review due by DD Month Year

REASSIGN REVIEW CANCEL REVIEW CHANGE PRIORITY VIEW FULL CLIENT RECORD

VIEW ALL CLIENT NOTES DD Month Year

2. Select another assessor and **REASSIGN**.

Re-assign this review for Name Surname

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

Assign to:*

☐ Name Surname	(10 assessments and 0 reviews assigned)
☐ Name Surname	(7 assessments and 0 reviews assigned)
☐ Name Surname	(0 assessments and 0 reviews assigned)
☐ Name Surname	(8 assessments and 0 reviews assigned)
☐ Name Surname	(0 assessments and 7 reviews assigned)
☐ Name Surname	(0 assessments and 0 reviews assigned)
☐ Name Surname	(0 assessments and 0 reviews assigned)
☐ Name Surname	(0 assessments and 0 reviews assigned)
☐ Name Surname	(15 assessments and 6 reviews assigned)
☐ Name Surname	(0 assessments and 0 reviews assigned)
☐ Name Surname	(21 assessments and 8 reviews assigned)
☐ Name Surname	(0 assessments and 0 reviews assigned)
☐ Name Surname	(24 assessments and 23 reviews assigned)
☐ Name Surname	(18 assessments and 2 reviews assigned)
☐ Name Surname	(0 assessments and 0 reviews assigned)

REASSIGN
CANCEL

3. The Support Plan Review will now be reassigned to the selected assessor and the review will appear in their **Current reviews** tab.

! Team leaders can also reassign Home Care correspondence notifications, by going to **Tasks and notifications** in the assessor portal homepage and selecting the **SAH Notifications** tab. More information on this can be found on [My Aged Care - Assessor Portal User Guide 9 - Tasks and notifications](#).

Re-assign Home Care correspondence notifications

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

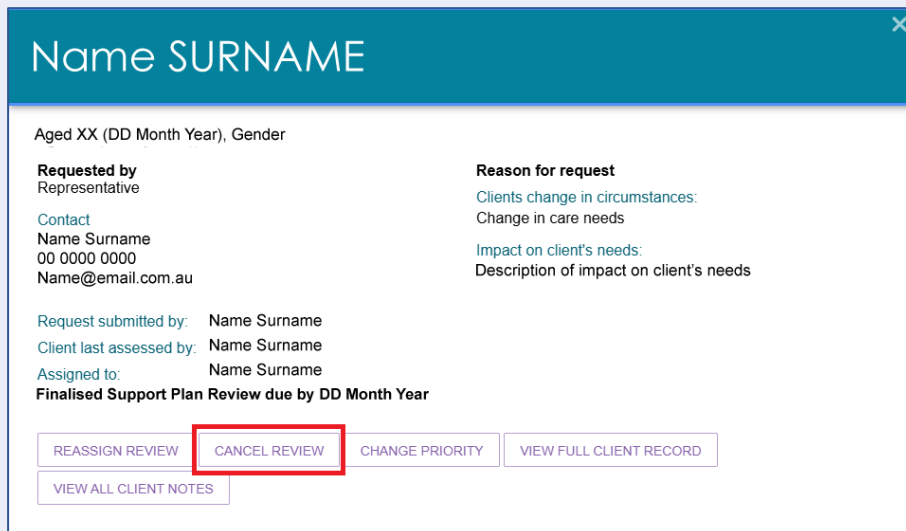
Please select Home Care correspondence notification recipient

☐ Name Surname
☐ Name Surname
☐ Name Surname
☐ Name Surname
☐ Name Surname
☐ Name Surname
☐ Name Surname
☐ Name Surname
☐ Name Surname
☐ Name Surname
☐ Name Surname
☐ Name Surname
☐ Name Surname

SAVE
CANCEL

Cancelling a Support Plan Review

In either the **Upcoming reviews** tab or **Assigned reviews** tab, select **CANCEL REVIEW** from the expanded view of the client card for the review to be cancelled.



Name SURNAME

Aged XX (DD Month Year), Gender

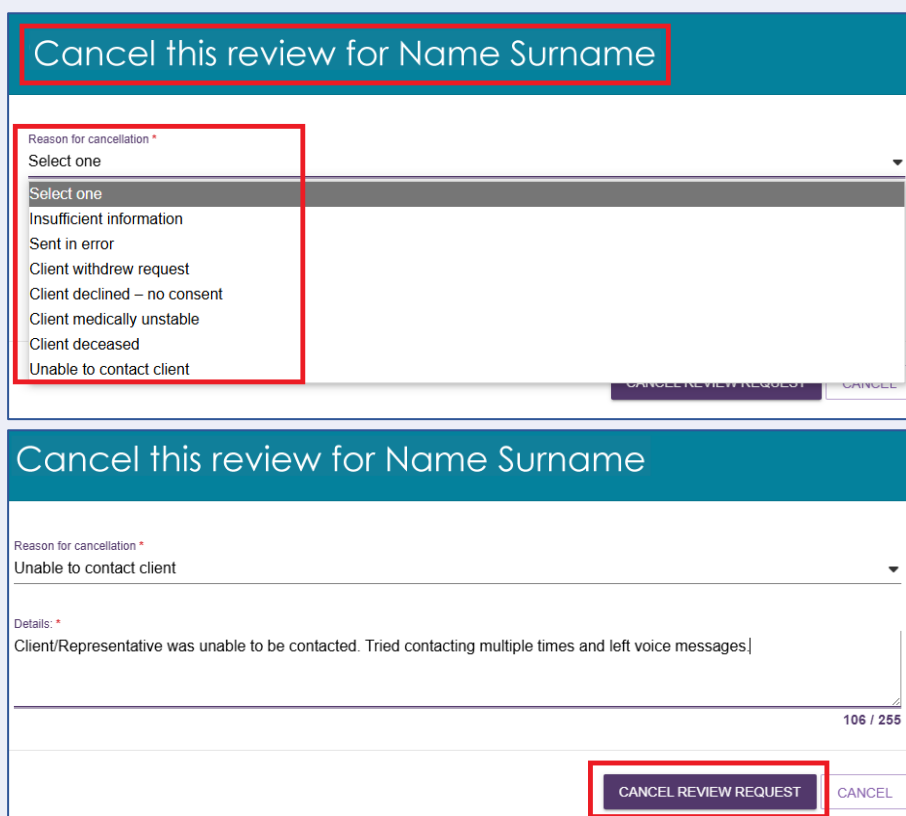
Requested by
Representative
Contact
Name Surname
00 0000 0000
Name@email.com.au

Reason for request
Clients change in circumstances:
Change in care needs
Impact on client's needs:
Description of impact on client's needs

Request submitted by: Name Surname
Client last assessed by: Name Surname
Assigned to: Name Surname
Finalised Support Plan Review due by DD Month Year

REASSIGN REVIEW **CANCEL REVIEW** CHANGE PRIORITY VIEW FULL CLIENT RECORD
VIEW ALL CLIENT NOTES

Select a reason for the cancellation from the with a brief explanation on the details field and then select **CANCEL REVIEW REQUEST**.



Cancel this review for Name Surname

Reason for cancellation *
Select one
Select one
Insufficient information
Sent in error
Client withdrew request
Client declined – no consent
Client medically unstable
Client deceased
Unable to contact client

Cancel this review for Name Surname

Reason for cancellation *
Unable to contact client

Details: *
Client/Representative was unable to be contacted. Tried contacting multiple times and left voice messages|

106 / 255

CANCEL REVIEW REQUEST CANCEL

The review will be removed from the Upcoming reviews tab. Completed and cancelled Support Plan Reviews will also appear in the Recent reviews tab of the assessor who completed the review. Support Plan Reviews will also be cancelled automatically where a new assessment referral is issued and accepted for the client. This will allow the new assessment to commence without requiring the Support Plan Review to be completed.

Cancelling a Support Plan Review with the reason of Client deceased

! Cancelling a Support Plan Review with the reason of **Client deceased** will change the client's status to **Deceased** and make the client record read only. Any unaccepted service referrals will be recalled, services in place will be ceased, assessments will be cancelled and the client's access to the client portal will be revoked. My Aged Care will not send correspondence to the client or their supporters after the status is changed to **Deceased**. My Aged Care will send a notification to the client's assessor and provider advising them to close or finalise any in-progress items. Where a client is active in the Support at Home Priority System or has been allocated funding, this will remove the client from the Support at Home Priority System and withdraw any allocated funding.

- When cancelling a Support Plan Review with the reason of **Client deceased**, you will need to provide the following information:
 - who, when and how you were informed that this person is deceased
e.g. "Mrs Smith rang to inform us that Mr Smith has passed away on Saturday"
 - date of death (if known)
 - attachments (e.g. death certificate, hospital discharge documents).
- Support Plan Reviews will also be cancelled automatically where a new assessment referral is issued and accepted for the client. This will allow the new assessment to commence without requiring the Support Plan Review to be completed.

Cancel this review for Name Surname

Reason for cancellation *
Client deceased

You are about to notify the department that Name Surname has passed away. Their records will become read only. You will still be able to finalise outstanding assessments and support plan reviews, and add notes and attachments.
Please supply the following information:

Who, when and how were you informed that this person is deceased? * ? 0 / 500

Date of death (if known) dd/mm/yyyy

Add Attachments
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 (if available)
Choose a file...

Details: * 0 / 255

CANCEL REVIEW REQUEST CANCEL

- Notes and attachments can be attached to the client record after the status is set to **Deceased**.
- When a client's status is changed to **Deceased**, if they have an in-progress assessment or has commenced services, a notification will be sent to the associated assessor in the assessor portal, advising the assessor to close or finalise the in-progress tasks.

Change priority for a Support Plan Review

Team leaders can change the priority of a Support Plan when assigning a review to an assessor in the **Upcoming reviews**.

- ! If the Support Plan Review has been requested for clients to access the **Support at Home End-of-Life Pathway**, the request will be classed as an **Urgent request** and the circumstances will be "Needs End-of-Life Pathway". The urgency must not be modified unless the original review requested did not appropriately flag for the End-of-Life Pathway – in these circumstances the priority must be updated to urgent.

 Urgent request Requested: DD Month YYYY		Requested action date: DD Month YYYY
Requested by Client Contact Name Surname 00 0000 0000 Request submitted by: Name Surname Client last assessed by: Name Surname Finalised Support Plan Review due by DD Month YYYY	Reason for request Why is this request urgent? EOL Pathway Clients change in circumstances: Needs End-of-Life Pathway Impact on client's needs: EOL pathway required	

Follow these steps to change Support Plan Review priority after it has been assigned:

1. Navigate to the **Assigned reviews** tab, open a client card or listing and select **CHANGE PRIORITY**.

Name SURNAME

Aged XX (DD Month Year), Gender

Requested by
 Representative

Contact
 Name Surname
 00 0000 0000
 Name@email.com.au

Reason for request

Clients change in circumstances:
 Change in care needs

Impact on client's needs:
 Description of impact on client's needs

Request submitted by: Name Surname
Client last assessed by: Name Surname
Assigned to: Name Surname
Finalised Support Plan Review due by DD Month Year

REASSIGN REVIEW

CANCEL REVIEW

CHANGE PRIORITY

VIEW FULL CLIENT RECORD

VIEW ALL CLIENT NOTES

2. Select the new priority from the drop-down list then select **CHANGE PRIORITY**. When changing priority to **Urgent** you must add the reason for changing the priority in the **Reason description** section, then select **CHANGE PRIORITY**.

Change support plan review priority for Name Surname

Change support plan review priority *

Urgent

Reason description: *

Description

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CHANGE PRIORITY CANCEL

3. A confirmation message will be displayed, and the review's priority will be displayed in the **Assigned review** tab.

✓ You have successfully changed the priority of this review.