

Assessor Portal User Guide 4 - Navigating and updating the client record

This guide outlines the contents and functions of the client record at a high level. Client records grant aged care needs assessors (assessors), providers, and My Aged Care staff with a single point of reference for client information.

The client record is also a valuable tool for easily setting up emergency contacts, disseminating important information between client, and facilitating the assessment of clients.

After a client and/or their support network has provided consent to enable their personal details to be appropriately recorded in My Aged Care and shared with assessors and Aged Care service providers, you will be able to interact with the many tabs of the client record elements as described in this guide.

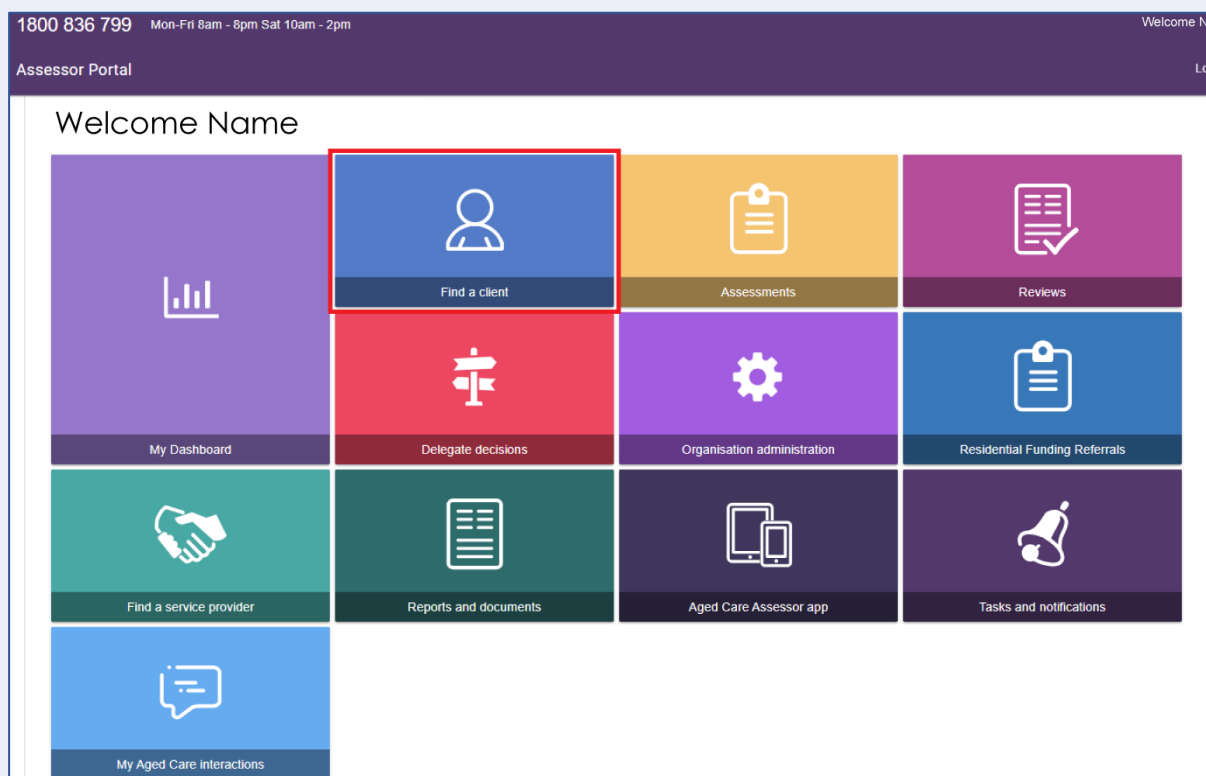
If the client and/or their carer request a call back from Carer Gateway and/or the National Dementia Helpline, assessors will need to obtain further consent in the relevant area in the assessor portal.

Accessing the client record	3
Accessing a sensitive client record	5
Accessing the client record of a client assigned to me	6
The Client Summary tab	10
The Client Details tab	13
Notification Preferences	14
Adding a Post Office Box address	16
Recording consent to share information with My Health Record	18
Notifying My Aged Care that the client is deceased	20
The Support Network tab	22
The Approvals tab	22
The Plans tab	25
The Attachments tab	25
The Services tab	28
The My Aged Care interactions tab	29
The Notes tab	30
Note types	31
Note add & view permissions	32
Adding client notes	32
Viewing and editing client notes	33
The Tasks and Notifications tab	35
The Residential Funding Classifications tab (clinical needs assessors)	35
More Information	35

Accessing the client record

The Find a Client function enables assessment organisations to search for all clients registered with My Aged Care. Assessment Organisations can only search for clients who have been referred to, and accepted by their organisation.

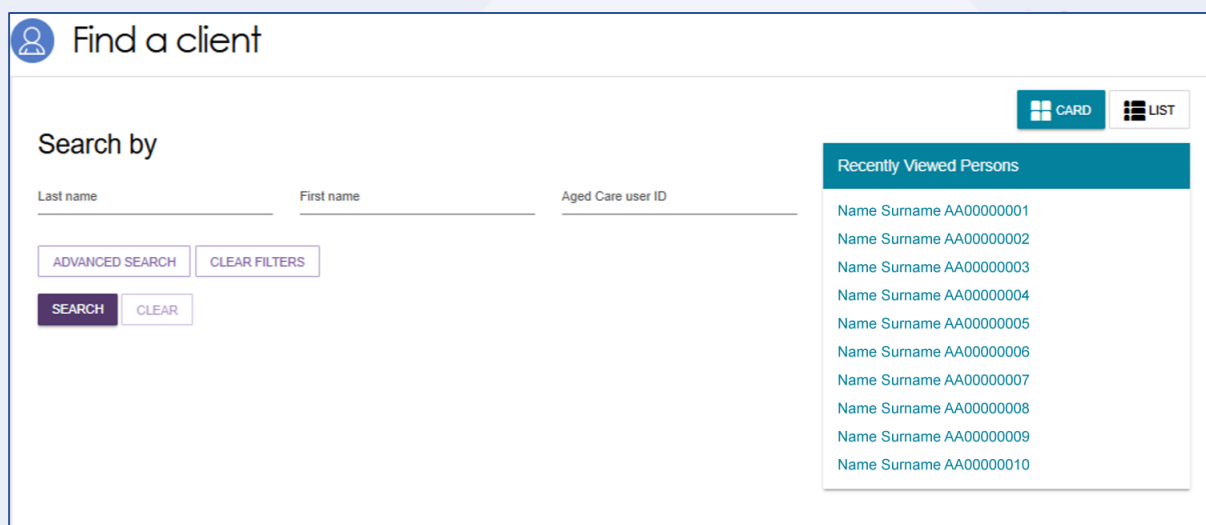
1. Log in to the My Aged Care assessor portal. From the home screen select the **Find a client** tile.



2. You can do a basic search by entering the **First Name**, **Last Name**, or **Aged Care User ID** into the fields, and then selecting the **SEARCH** button.

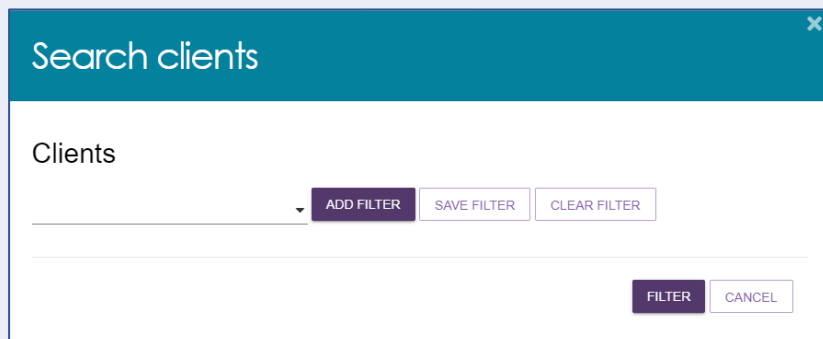
To go directly to a recently viewed client, use the links under **Recently Viewed Persons** heading on the right.

You can change the display between **Card View** and **List View** by selecting the relevant button on the right.

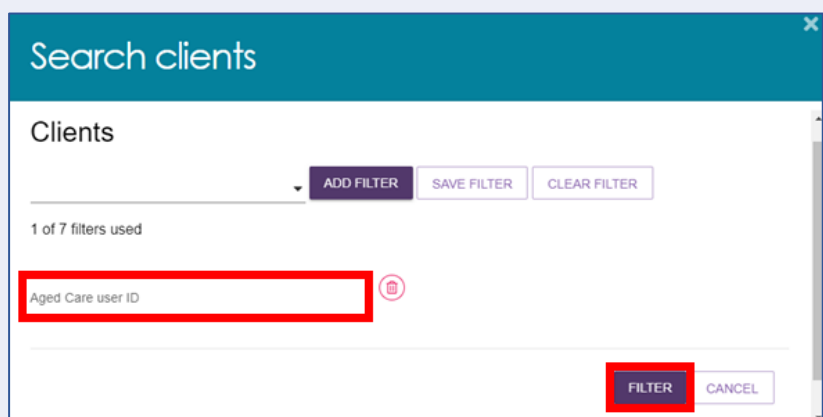


3. Alternatively, you can do an advanced search. Advanced search works by applying filters to the list of clients. These filters include options such as **First Name**, **Home Contact Number**, **Postcode** etc. By adding multiple filters together, specific groups of clients can be found.

Select the **ADVANCED SEARCH** button from the Find a Client screen. The Search clients pop-up window will open. Use the drop-down arrow to choose the kind of filter you wish to add. Then, select the **ADD FILTER** button to reveal the input field for that filter.



4. Fill in the input field that appears with the information required. You can repeat the process above to add additional filters to the advanced search. A maximum of 7 filters can be applied at once. Once you have finished adding filters, select the **FILTER** button to begin your advanced search.



5. Select the name of your chosen client to proceed to their client record.

Last name: S, First name: Name, Aged Care user ID: [blank]

MODIFY FILTER OPTIONS, CLEAR FILTERS

First name is Name and last name is S

SEARCH, CLEAR

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

Current sort order is Last name

Name: SURNAME XX Street Name, SUBURB, STATE, POSTCODE 00 0000 0000 Aged care user ID: AA00000001 ✓ Active	Name: SURNAME No address details found Aged care user ID: AA00000002 ✓ Active	Name: SURNAME XX Street Name, SUBURB, STATE, POSTCODE 00 0000 0000 Aged care user ID: AA00000003 ✓ Active
--	---	--

Accessing a sensitive client record

A sensitive client record may contain one or more:

- sensitive attachment
- sensitive client status
- sensitive notes.

In the Client Record, the client details banner will have wording to this effect underneath the client's address, to identify that this record contains sensitive information.

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

Assessor Portal

Home | Find a client | Name SURNAME

Mr Name SURNAME

Gender, XX years old, DD Month Year, AA00000001

XX Street Name, SUBURB, STATE, POSTCODE

Prefers to speak [language] **sensitive attachment**

Primary contact: Name Surname (Role) - 00 0000 0000

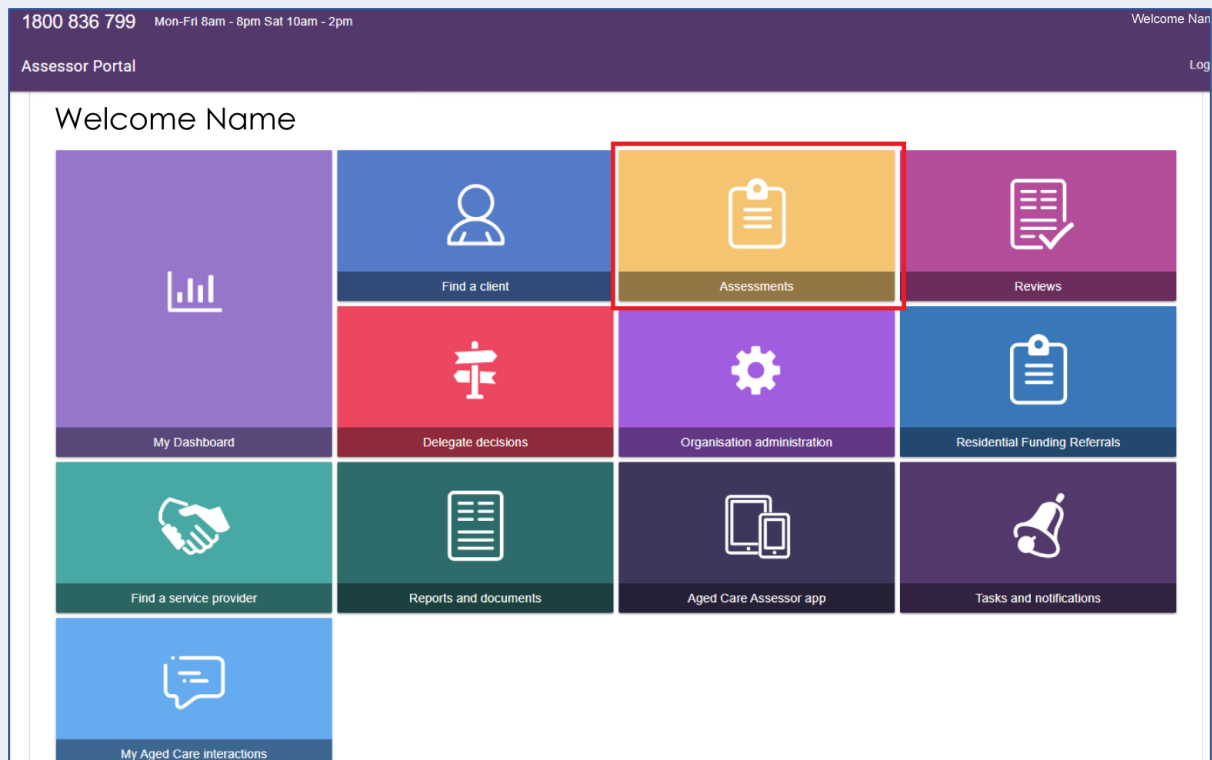
Carer: Name Surname (Role) - 00 0000 0000

[View support network](#)

To access the sensitive information, refer to [the Attachments tab](#) and [the Notes tab](#) for more details.

Accessing the client record of a client assigned to me

1. Log in to the My Aged Care assessor portal and select the **Assessments** tile.



2. If you have access to more than one outlet, select your client's assessment outlet from the drop-down list, then select the **SELECT OUTLET** button to continue.

The screenshot shows a form titled 'Select outlet'. It features a dropdown menu labeled 'Outlet *' with the text 'Please select' and a downward arrow. Below the dropdown, there is a red error message that says 'Outlet is required'. At the bottom right of the form, there are two buttons: 'SELECT OUTLET' and 'BACK'.

3. You can use filter headings such as **Last Name**, **Aged Care ID**, or **Locality** to sort your assigned clients. Once you have found the appropriate client, use the expand button (To the left of the listing in List view, or at the top right corner of the card in Card view) to view more details.

List View

Current assessments

Currently viewing Organisation name

Current assessments Recent assessments

Filter by

Last name First name Aged Care user ID

ADVANCED SEARCH CLEAR FILTERS

FILTER CLEAR

1 to 8 out of 8 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	Assessment In Progress (Completed Support Plan)	▲ DD/MM/YYYY (XX days overdue)	High
SURNAME Name	AA00000001		Comprehensive	DD/MM/YYYY	Assessment Not Started (Completed Triage)	▲ DD/MM/YYYY (XX days overdue)	Low
SURNAME Name	AA00000001	SUBURB, STATE, POSTCODE	Comprehensive	DD/MM/YYYY	Assessment Not Started (Completed Triage)	▲ DD/MM/YYYY (XX days overdue)	Medium
SURNAME Name	AA00000001		Comprehensive	DD/MM/YYYY	Assessment In Progress (Completed Support Plan)	▲ DD/MM/YYYY (XX days overdue)	High

Card View

Current assessments

Currently viewing Organisation name

Current assessments Recent assessments

Filter by

Sort by: Assessment Priority In order of: High to Low GO

Current sort order is Assessment Priority

1 to 8 out of 8 matching results

Assessment Not Started

Name SURNAME

● SUBURB, STATE, POSTCODE

Aged care user ID: AA00000001

Date accepted: DD Month Year

Completed Triage due by: DD Month Year

Comprehensive 241 days overdue

Assessment Not Started Medium

Name SURNAME

Aged care user ID: AA00000002

Date accepted: DD Month Year

Completed Triage due by: DD Month Year

Comprehensive 236 days overdue

Assessment Not Started Low

4. A pop-up will then display with expanded details for that client. From this pop-up you can view the statuses of client's support plan and assessment. Further information can be viewed by selecting the magnifying glass next to the status.

Name SURNAME

i Please confirm that Name Surname, DD Month YYYY, 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

Assessment details

Client story
No client story was recorded

Comments
Cohabitant details
[Name Surname](#)

Assessment type Comprehensive
Assessment reason Self-Referral
Assessment setting Non-Hospital
Assessor Name Surname
Triage conducted by Name Surname

Support plan ● Triage Completed
Comprehensive Assessment ● Triage Completed

VIEW FULL CLIENT RECORD VIEW CLIENT REPORT
REFER URGENT SERVICES START ASSESSMENT FLAG AS END-OF-LIFE

5. If applicable, you can view **Cohabitant details**. A cohabitant refers to another aged care client who lives at the same address as the client undergoing assessment and has a recorded active relationship with the client. Up to two cohabitants will be listed under this heading.

Name SURNAME

Accepted on DD Month Year

Preferences
No preference was recorded

Completed Triage due by DD Month Year

Assessment details

Client story
No client story was recorded

Comments
Cohabitant details
[Name Surname](#)

Assessment type Comprehensive
Assessment reason Self-Referral
Assessment setting Non-Hospital
Assessor Name Surname
Triage conducted by Name Surname

Support plan ● Triage Completed
Comprehensive Assessment ● Triage Completed

VIEW FULL CLIENT RECORD VIEW CLIENT REPORT
REFER URGENT SERVICES START ASSESSMENT FLAG AS END-OF-LIFE

6. Select the **VIEW FULL CLIENT RECORD** button to navigate to the client record page.

Name SURNAME	
Preferences	Accepted on DD Month Year
No preference was recorded	Completed Triage due by DD Month Year
Assessment details	Client story
Assessment type Comprehensive	No client story was recorded
Assessment reason Self-Referral	Comments
Assessment setting Non-Hospital	Cohabitant details
Assessor Name Surname	Name Surname
Triage conducted by Name Surname	
Support plan	
Comprehensive Assessment	
● Triage Completed	
● Triage Completed	

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

[REFER URGENT SERVICES](#)
[START ASSESSMENT](#)
[FLAG AS END-OF-LIFE](#)

7. You can generate a summary PDF report without opening the client record. The report includes client details, support network details, notes, assessment history, care approvals, and the client's interactions with My Aged Care. Select **VIEW CLIENT REPORT** to generate the report.

Name SURNAME

Preferences

No preference was recorded

Assessment details

Assessment type

Comprehensive

Assessment reason

Self-Referral

Assessment setting

Non-Hospital

Assessor

Name Surname

Triage conducted by

Name Surname

Support plan

Triage Completed

Comprehensive Assessment

Triage Completed

Accepted on DD Month Year

Completed Triage due by

DD Month Year

Client story

No client story was recorded

Comments

Cohabitant details

[Name Surname](#)

VIEW FULL CLIENT RECORD

VIEW CLIENT REPORT

REFER URGENT SERVICES

START ASSESSMENT

FLAG AS END-OF-LIFE

The Client Summary tab

The **Client summary** tab serves as the primary location for assessors to quickly access client information and coordinate care effectively. It contains the Client Journey Tracker which is a visual tool that shows where a client is in their My Aged Care journey and what happens next. Underneath the tracker, the Client Summary provides an overview of a client's completed and in-progress assessments; recommendations and approvals; and their service delivery status.

1. Select the **VIEW FULL CLIENT RECORD** button from the client's card or listing to navigate to **Client summary** screen.

Mr Name SURNAME

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

Primary contact: Name Surname (Role) - 00 0000 0000
No support relationships recorded

Client summary

REFER THIS CLIENT FOR ASSESSMENT
VIEW CLIENT REPORT

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

Tasks and Notifications
Residential Funding Classifications

Client tracker

✓

Registered

⌚

Assessment

⌚

Waiting for services

○

Receiving services

A support plan review has been completed.
Next step - If you have any questions about the support plan review, you can call the assessment organisation using the phone number in the summary table below.

⌚ Your Support at Home classification funding has been withdrawn for one or more classifications. You can view the details in your summary table below.
Next step - If you want to enter care under Support at Home but your funding has been withdrawn, please call My Aged Care on 1800 200 422.

⌚ You have been placed on the Support at Home Priority System.
Next step - You will get a letter when this funding is available. Visit the Support at Home program page on the My Aged Care website to learn more about what you can do while you wait www.myagedcare.gov.au/aged-care-programs/support-at-home-program

⌚ Your referral for assessment has been accepted by an assessment organisation.
Next step - An assessment organisation will be in touch to confirm your eligibility for assessment and the type of assessment you need. Call the assessment organisation if they have not contacted you to discuss your care needs within 3 days. The phone number is in the summary table below.

Client summary

Assessments

Comprehensive Assessment

Finalised on DD Month Year
Organisation name
00 0000 0000

Recommendations and approvals

Service delivery status

Aged care (nursing) home (Residential Care)

Support at Home

Flexible care programs

Residential Respite Care

Home support Ongoing - SaH Classification 3

Assistive technology Short-term - AT Medium

Home modifications Short-term - HM Medium

View support at home letters

SEE SERVICE DETAILS

Referral code ABC0000000001

Home support Ongoing - SaH Classification 3 Funding pending

Assistive technology Short-term - AT Medium Funding withdrawn DD Month Year

Home modifications Short-term - HM Medium Funding withdrawn DD Month Year

No referrals issued

Concerns

Goals

I am not able to do the things I used to be able to do at home.

I would like to be able to live at home safely with support.

Status: In Progress

I would like to make the house safer, so it is easier and safer to move around and so I don't trip over.

Status: In Progress

2. The below image shows an example of a client transitioned from a Home Care Package (HCP) classification.

Client summary

Assessments

Comprehensive Assessment ⓘ

Finalised on DD Month Year
Organisation name
00 0000 0000

	Recommendations and approvals	Service delivery status
Support at Home ⓘ	Home support Ongoing - Transitioned HCP Level 3 View support at home letters SEE SERVICE DETAILS	
Flexible care programs ⓘ	Services under the MPSP	No referrals Issued

The below image shows an example of a client transitioned from the Multi-Purpose Service Program (MPSP) or the National Aboriginal or Torres Strait Islander Flexible Aged Care Program (NATSIFACP), and is deemed suitable for accessing services or funding under the program:

- Information message states that 'client is approved to access services through a provider under MPSP or NATSIFACP'
- The phrase '(MPSP NATSIFACP Deeming)' appears next to the approved service/s.

Client summary

REFER THIS CLIENT FOR ASSESSMENT VIEW CLIENT REPORT

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

Client is approved to access services through a provider under MPSP or NATSIFACP. Please view related correspondence in Attachments.

Client Tracker

Client summary

Assessments

Comprehensive Assessment ⓘ

Assessment finalised on DD Month Year
Organisation name 00 0000 0000

	Recommendations and approvals	Service delivery status
Aged care (nursing) home (Residential Care) ⓘ	Residential Permanent (MPSP NATSIFACP Deeming) Approval start date: DD Month Year Residential Respite Care (MPSP NATSIFACP Deeming) Approval start date: DD Month Year	Referral not issued
Flexible care programs ⓘ	Services under the MPSP (MPSP NATSIFACP Deeming)	Started on DD Month Year - Organisation name 00 0000 0000

3. Select **See Service Details** under the **Recommendations and Approvals** section to view more information about the client's linked services.

This section shows details about the client's linked services, including the service provider, referral history, funding status, service progress, and any short-term supports such as reablement. It helps assessors track service delivery and check that the support being provided matches the client's support plan.

The screenshot shows the 'Client summary' tab in the My Aged Care system. The top navigation bar includes tabs for Client summary, Client details, Support network, Approvals, Plans, Attachments, Services, My Aged Care interactions, and Notes. Below this, there are sub-tabs for Tasks and Notifications and Residential Funding Classifications. The main content area is divided into sections: 'Client tracker', 'Client summary', 'Assessments', 'Recommendations and approvals', and 'Service delivery status'. In the 'Recommendations and approvals' section, there is a card for 'Support at Home' with a question mark icon. Below this card, the text 'Home support Ongoing - SaH Classification 2' is displayed, along with a link 'View support at home letters'. A red box highlights the 'SEE SERVICE DETAILS' button.

4. A pop-up window will appear showing all recommended services. Select the **Expander** icon to view more details about a service. You can also view the funding status for each recommended service.

The screenshot shows the 'Support at home' pop-up window. The title bar is 'Support at home'. Below the title bar, there is a section for 'Home support Ongoing - SaH Classification 4'. To the right of this section, there is a legend for funding status: 'Funding pending' (yellow circle) and 'Funding assigned' (green circle). Below the legend, there is a list of services. The first service, 'Home support Short-term - SaH Restorative Care Pathway', is highlighted with a red box. This service has an 'Expander' icon (a square with a plus sign) next to it. Below the service name, there is a list of support categories and their descriptions:

- Domestic assistance:** General house cleaning, Laundry services, Shopping assistance
- Home maintenance and repairs:** Assistance with home maintenance and repairs, Expenses for home maintenance and repairs, Gardening
- Home or community general respite:** Community and centre-based respite, Flexible respite
- Meals:** Meal delivery, Meal preparation
- Nursing care:** Enrolled nurse clinical care, Nursing assistant clinical care, Nursing care consumables, Registered nurse clinical care
- Nutrition:** Nutrition supports
- Personal care:** Assistance with self-administration of medications, Assistance with self-care and activities of daily living, Continence management (non-clinical)
- Restorative care management:** Home support restorative care management

The below image shows an example of same pop-up for a client with **Transitioned Home Care Package (HCP) classification**.

Support at home

Home Support Ongoing - Transitioned HCP Level 4 ● Funding assigned

- **Domestic assistance:** General house cleaning, Laundry services, Shopping assistance
- **Home maintenance and repairs:** Gardening, Assistance with home maintenance and repairs, Expenses for home maintenance and repairs
- **Meals:** Meal delivery, Meal preparation
- **Social Support and Community Engagement:** Group social support, Individual social support, Accompanied activities, Cultural support, Digital education and support, Assistance to maintain personal affairs, Expenses to maintain personal affairs
- **Transport:** Direct transport, Indirect transport
- **Personal care:** Assistance with self-care and activities of daily living, Assistance with the self-administration of medication, Continence management (non-clinical)
- **Care management:** Home support care management
- **Nursing care:** Registered nurse clinical care, Enrolled nurse clinical care, Nursing assistance clinical care, Nursing care consumables
- **Allied health and therapy:** Allied health assistance, Podiatry, Social work, Speech pathology, Diet or nutrition, Aboriginal or Torres Straight Islander Health Practitioner assistance, Aboriginal or Torres Straight Island Health worker assistance, Physiotherapy, Psychology, Exercise physiology, Occupational therapy, Counselling or psychotherapy, Music therapy

Place assigned Organisation name - HCP Level 2

CLOSE

5. Select the Print Page (Printer) button at the right-hand side of each heading to print the Client Summary information.

Client summary REFER THIS CLIENT FOR ASSESSMENT VIEW CLIENT REPORT

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

Residential Funding Classifications

Client tracker Edit Print

Client summary Edit Print

The Client Details tab

The **Client Details** tab shows a detailed profile of the client. It includes important personal and demographic information that supports the assessment process and care planning.

It gives assessors a complete and up-to-date view of the client's information to support informed decisions and accurate, person-centred care planning. The page also contains an option to [notify My Aged Care when the client is deceased](#).

Update any details by selecting the **Edit** icon at the top right corner of each section.

Client details

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

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

Residential Funding Classifications

About Name

[NOTIFY MY AGED CARE OF A DEATH](#)

Personal information

Born DD Month Year, Nationality, born in Country, marital status, living status

Status: Active

Preference for a First Nations Assessment Organisation to do their assessment: Not specified

Identity documents (ID)

Aged Care ID: AA00000001

Identity Status

IHI Record status: Not Attempted

Identity match status: Not Attempted

Wallet check status: Incomplete

Client association status: Not Attempted

To contact Name

Contact details:

- 00 0000 0000 (mobile) - Preferred contact number Unverified [VERIFY](#)
- [?](#) name@email.com.au

Primary Contact

This is who My Aged Care will contact first

Name SURNAME (role)

Notification preferences

Current preferences:

- Name SURNAME (role) [EMAIL](#) [SMS](#)

Communication requirements

- Prefer to speak language

Address details

Home address [edit](#)

Service delivery address [edit](#)

Send any correspondence to [edit](#)

Payment details

Receiving payments

No payments found

Health insurance

Private health insurance

No health insurance found

Service information

The following information is from the Department of Human Services claims system. It may take up to a month to be updated.

Consent

No consent found. [edit](#)

The client or someone in their support network can nominate a **Primary Contact**. This information helps assessors, My Aged Care contact centre staff, and service providers identify the main contact for the client. The system does not use this field to determine who receives care-related correspondence.

Primary Contact

This is who My Aged Care will contact first

Name SURNAME (role)

Notification Preferences

Notification preferences

Current preferences:

- Name SURNAME (role) [EMAIL](#) [SMS](#)

My Aged Care clients and their support network can also receive email and/or SMS notifications when a client reaches the following key stages of their My Aged Care journey:

- client registration is complete
- the client's assessment is finalised
- the client is approved for care after completing a Comprehensive assessment
- a client receives a **Support at Home** service assignment, or the system generates a letter for them, such as an assignment or withdrawal letter
- a Support Plan Review request has been submitted
- when a support relationship becomes active, is declined, becomes inactive, or is about to expire
- the submission and processing of documents related to support relationships.

For more information about setting up and configuring notifications for clients and/or their support network, refer to [My Aged Care – Assessor Portal User Guide 2 – Registering support people and adding relationships](#).

! When adding or updating an address, make sure to select **VALIDATE THIS ADDRESS** before saving. This helps ensure the address is correct so that the client and their support network can receive communications from the My Aged Care system.

Edit client's home address details

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

Unit number or building name and level (if applicable)

Street number eg. 201 or 34-36 * Street name * Street type *

Enter suburb or postcode and select from the list below *

SUBURB NOT LISTED

Country *
Australia

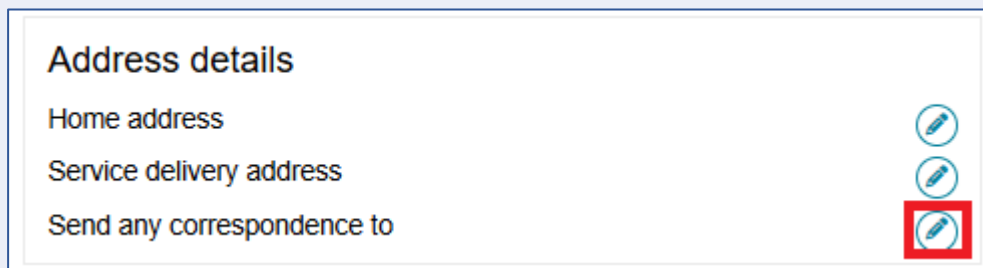
VALIDATE THIS ADDRESS

SAVE ADDRESS CANCEL

Adding a Post Office Box address

Only Clinical assessors and assessment delegates can add a Post Office Box address to a client record as the preferred address for all correspondence.

1. In the Address details section of the Client details page, select the edit icon next to **Send any correspondence to**.



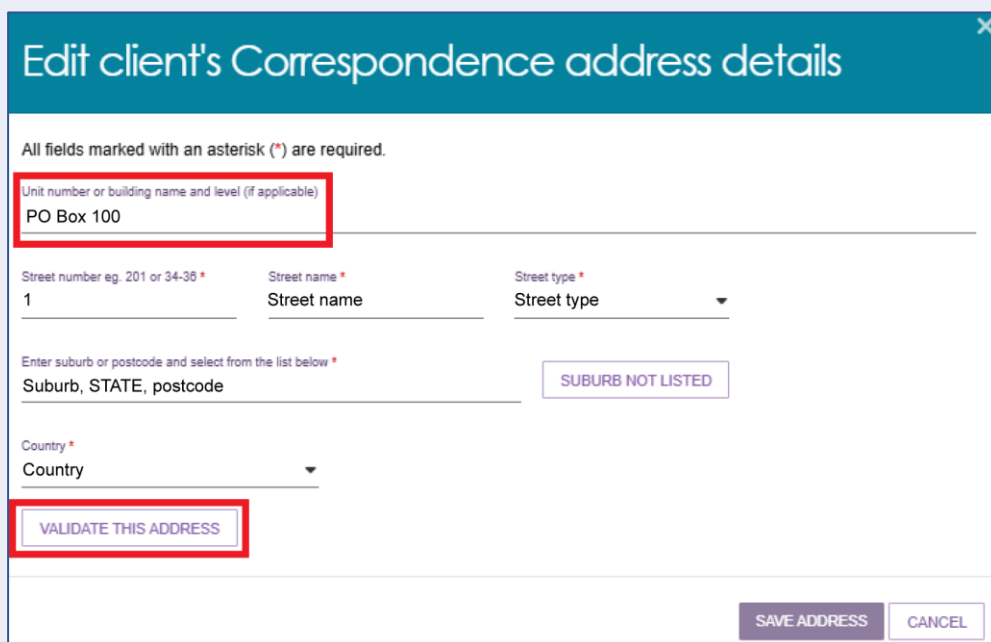
Address details

Home address

Service delivery address

Send any correspondence to

2. Enter the PO Box type and number under the 'Unit number of building name and level' section. Enter the rest of the address as directed, then select **VALIDATE THIS ADDRESS**.



Edit client's Correspondence address details

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

Unit number or building name and level (if applicable)
PO Box 100

Street number eg. 201 or 34-36 *
1

Street name *
Street name

Street type *
Street type

Enter suburb or postcode and select from the list below *
Suburb, STATE, postcode

SUBURB NOT LISTED

Country *
Country

VALIDATE THIS ADDRESS

SAVE ADDRESS CANCEL

3. If the PO Box address is valid, the **Save Address** button becomes available. If the system cannot validate the address, it displays a list of alternative addresses. Select the most appropriate option, or choose **Not found, use entered address anyway**. Then select **Save Address**.

Edit client's Correspondence address details

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

Enter suburb or postcode and select from the list below *

Suburb, STATE, XXXX

SUBURB NOT LISTED

Country *

Country

VALIDATE THIS ADDRESS

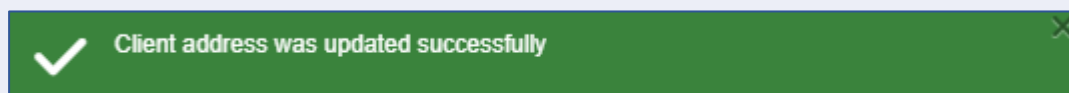
Did you mean*

☐ XX Street Name, SUBURB STATE XXXX
☒ Post Office Box 100, SUBURB STATE XXXX
☐ Post Office Box XX, SUBURB STATE XXXX
☐ General Post Office Box XX, SUBURB STATE XXXX
☐ Not found, use entered address anyway: XX Street Name, SUBURB STATE XXXX

SAVE ADDRESS

CANCEL

4. A green banner appears: 'Client address was updated successfully'.



The PO Box address displays in the Address details section, underneath 'Send any correspondence to'.

Select the **SEND CORRESPONDENCE TO HOME ADDRESS** button if you do not want to send correspondence to the PO Box.

Address details

Home address

Service delivery address

Send any correspondence to

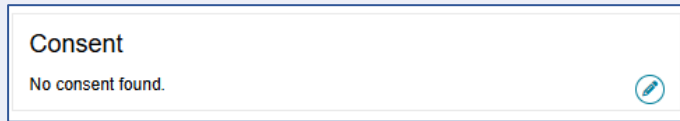
Post Office Box 100, SUBURB STATE XXXX

SEND CORRESPONDENCE TO HOME ADDRESS

Recording consent to share information with My Health Record

You can view and update the client's consent to share information with **My Health Record** in the **Consent** section.

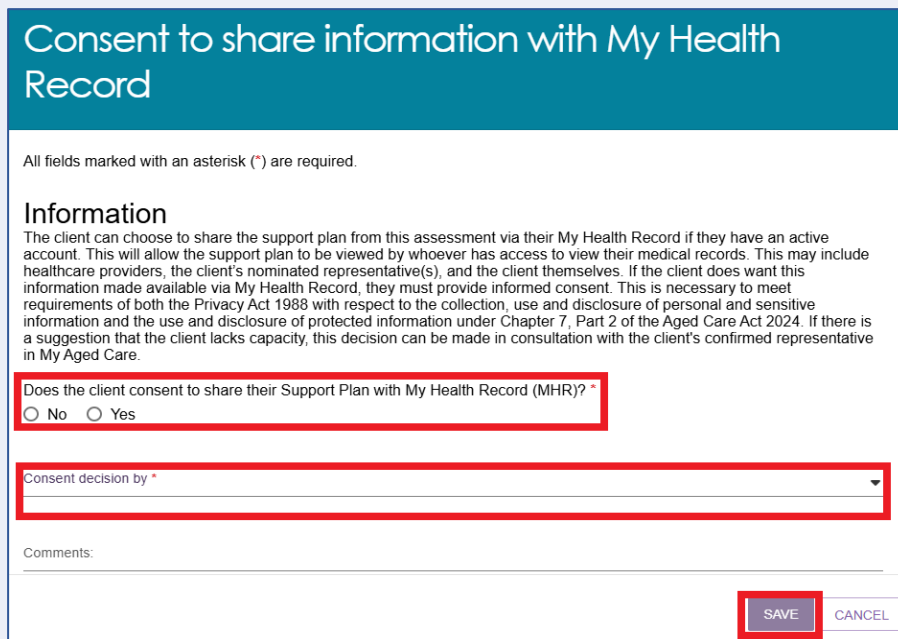
1. To update a client's consent, select the **EDIT** (pencil) icon.



Consent

No consent found.

2. A pop-up window will appear. If the client agrees to share their information with **My Health Record**, select **Yes**, indicate whether the consent was provided by the client or their Supporter Guardian, and then select **Save**.



Consent to share information with My Health Record

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

Information

The client can choose to share the support plan from this assessment via their My Health Record if they have an active account. This will allow the support plan to be viewed by whoever has access to view their medical records. This may include healthcare providers, the client's nominated representative(s), and the client themselves. If the client does want this information made available via My Health Record, they must provide informed consent. This is necessary to meet requirements of both the Privacy Act 1988 with respect to the collection, use and disclosure of personal and sensitive information and the use and disclosure of protected information under Chapter 7, Part 2 of the Aged Care Act 2024. If there is a suggestion that the client lacks capacity, this decision can be made in consultation with the client's confirmed representative in My Aged Care.

Does the client consent to share their Support Plan with My Health Record (MHR)? *

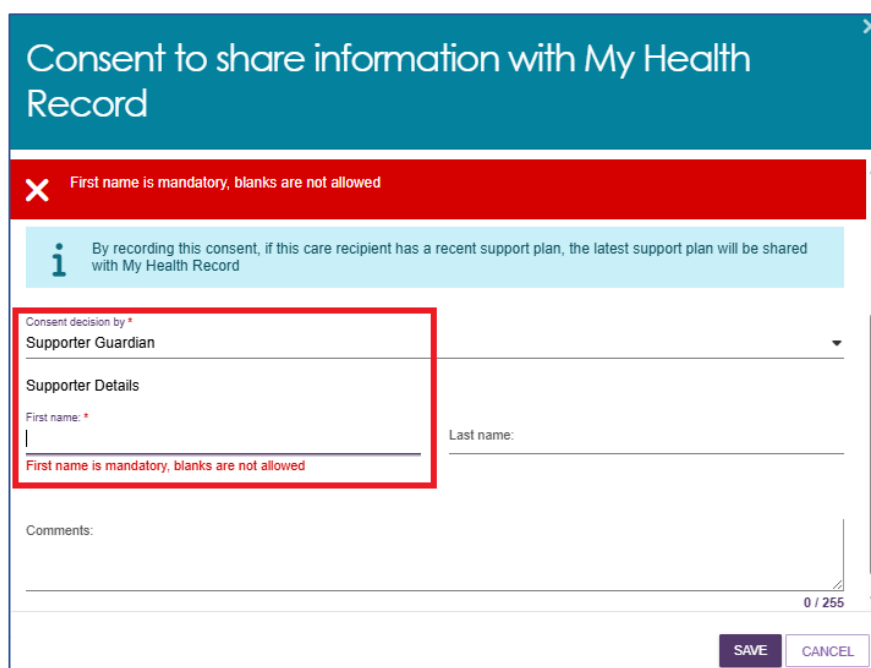
☐ No ☐ Yes

Consent decision by *

Comments:

SAVE **CANCEL**

- !** If a Supporter Guardian makes the consent decision, you must enter their **first name** before you can continue.



Consent to share information with My Health Record

× First name is mandatory, blanks are not allowed

i By recording this consent, if this care recipient has a recent support plan, the latest support plan will be shared with My Health Record

Consent decision by *

Supporter Guardian

Supporter Details

First name: *

Last name:

First name is mandatory, blanks are not allowed

Comments:

0 / 255

SAVE **CANCEL**

If the answer is **No** and the client or their Supporter Guardian is withdrawing consent, any support plan information previously shared with **My Health Record** will be removed.

Select a reason for declining consent from the drop-down list, then select **Save**.

If **Other** is selected as the reason for declining consent, you must enter a comment explaining the reason before selecting **Save**.

Notifying My Aged Care that the client is deceased

If a client's status is marked as **Deceased**, their record becomes **read-only**, and you will no longer be able to update their information. Once this status is recorded in My Aged Care, the client's support network will lose access to the record. Notifications will be sent to the client's assessor and provider, advising them to close or complete any outstanding tasks. You can still add notes and attachments to the client record, and any assessments already in progress can be finalised after the status has been updated.

A banner will be displayed on all tabs of the client record. If the client's status is incorrect, please contact the service provider and assessor helpline on 1800 836 799.



1. Select the **NOTIFY MY AGED CARE OF A DEATH** button, located in the top right corner of the **Client Details** page in the client record.

2. A pop-up screen will prompt you to input all information and upload the supporting documents as required. Select **SAVE**.

3. A pop up reminds you that these changes cannot be reverted.

To confirm, select **OK**.

Confirm notification to My Aged Care

You are about to notify My Aged Care that this person is deceased. This will automatically close all active records such as assessment referrals, services, service referrals etc.

These changes cannot be reverted.

Click OK to confirm to My Aged Care that Name Surname is deceased and the information provided is correct. Click Cancel to update or provide additional information.

OK
CANCEL

4. The **Client Details** page opens and displays the following information.

Thank you for notifying My Aged Care. We will update our records shortly.

The Department has been notified that this client is deceased. Please contact us on 1800 836 799 if this is incorrect.

5. The client status will be updated to deceased on the records. The client card will appear as shown below. If there are any in-progress assessments for the client, a notification will be sent to the associated assessor and provider advising them to close or finalise the in-progress tasks.

Name

SURNAME

1 Street Name
SUBURB, STATE, POSTCODE

Aged care user ID AA00000001

Deceased

The Support Network tab

The **Support Network** tab provides a summary of the people and relationships that play a role in supporting the client.

This includes informal support such as family members, friends, or neighbours, as well as formal supporters like carers, supporter guardians, or supporter organisations.

The tab outlines each person's relationship with the client, their role in the client's care, and their contact details if relevant.

This information helps assessors understand the client's current support structure and identify any gaps in care or additional support needs.

For more information about creating supporter relationships, refer to [My Aged Care – Assessor Portal User Guide 2 – Registering support people and adding relationships](#).

The screenshot shows the 'Support network' tab selected in the My Aged Care Assessor Portal. The interface includes a top navigation bar with tabs for 'Client summary', 'Client details', 'Support network' (highlighted), 'Approvals', 'Plans', 'Attachments', 'Services', 'My Aged Care interactions', and 'Notes'. Below this, there are buttons for 'REFER THIS CLIENT FOR ASSESSMENT' and 'VIEW CLIENT REPORT'. The main content area is titled 'Support network' and contains a sub-navigation bar with tabs for 'Name's support network', 'People [name] supports', 'Pending documents', and 'Declined, ended and cancelled relationships'. The 'Name's support network' tab is active, showing a list of supporters. Two supporter cards are visible, each displaying the supporter's name, relationship, contact details, and a status of 'Active'.

The Approvals tab

The **Approvals** tab shows the outcomes of a client's assessments and the government-funded services they are approved to receive. This information helps assessors, clients, and service providers understand the client's care options, make appropriate referrals, and plan services.

To view more information about an approval, select the **Expand** button next to it. This displays additional details, such as the approval status, priority category, and correspondence notification settings.

1. Select the **Approvals** tab to navigate to the approvals page of the client record.

Approvals

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

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

Tasks and Notifications Residential Funding Classifications

This page shows you what care approvals are in place

Current care approvals

Home support Ongoing - SaH Classification 2

Seeking services

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

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

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

Last update: DD/MM/YYYY HH:MM:SS AM by Name Surname (assessor)

DHS prior approvals last updated

Never

Correspondence

Notify of Support at Home correspondence ?

No-one selected

The below image shows an example of a client who was previously approved for a Home Care Package. In the **Current Care Approvals** section, this client has a new status of 'Home support ongoing - Transitioned HCP Level [number]'

[View support network](#)

Current care approvals

Residential Permanent

Home support Ongoing - Transitioned HCP Level 3

Previous care approvals

The **Previous Care Approvals** section shows any lapsed or ceased approvals, including Urgent Commonwealth Home Support Program (CHSP) services.

Previous care approvals

Home support Short-term - SaH Restorative Care Pathway

Approval starts DD Month YYYY

Approval stops DD Month YYYY

Source System Gateway

Home support services: ?

2. Select the expand icon next to the relevant care approval to view more details.

Current care approvals

Home support Ongoing - SaH Classification 8

Assistive technology Short-term - AT Medium

Delegate decision completed and submitted to SvA.

Priority category: Medium

Approval starts: DD Month YYYY

Approval stops: DD Month YYYY

Status: Funding pending

Source System: Gateway

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

Seeking services

Home modifications Short-term - HM Medium

Delegate decision completed and submitted to SvA.

Priority category: Medium

Approval starts: DD Month YYYY

Approval stops: DD Month YYYY

Status: Funding pending

Source System: Gateway

Home modifications services: **Home Adjustments:** Home modifications prescription and clinical support, Home modification products

Seeking services

3. If the client's circumstances change and they no longer want a service they are currently seeking, select **Change** and update the service from **Seeking** to **Not Seeking**. You must complete this process for each approved Support at Home service type. If the client's place was previously withdrawn, advise them to contact My Aged Care to rejoin the **Support at Home Priority System**.

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

Tasks and Notifications | Residential Funding Classifications

This page shows you what care approvals are in place

Current care approvals

Home support Ongoing - SaH Classification 2

Seeking services

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

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

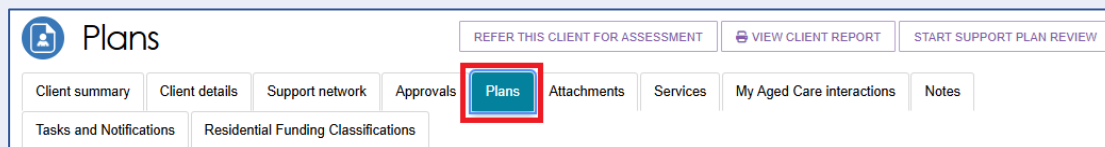
Home support Ongoing - client is Seeking services **CHANGE**

Last update: DD/MM/YYYY HH:MM:SS AM by Name Surname (assessor)

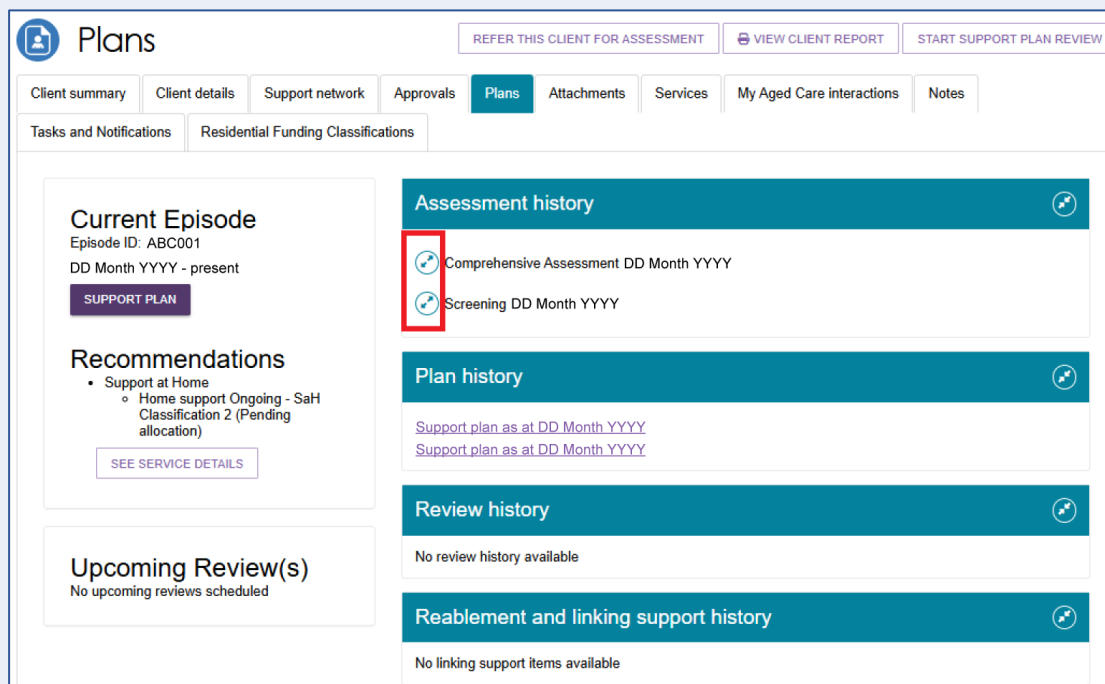
The Plans tab

The Plans tab provides a summary of the client's support plan, outlining the outcomes of their assessment and the services or goals identified to meet their needs.

1. Select the **Plans** tab to navigate to the plans page of the client record.



2. To view more information about an assessment, select the **Expand** button next to the relevant item under **Assessment History**.



The Attachments tab

The **Attachments** tab contains all documents attached to the client's record, including those uploaded through the **Aged Care Assessor App**. Assessors can use this tab to view, upload, and manage attachments related to a client's assessment and care planning.

- **Assessment Attachments** are any documents that are relevant to the client's assessment, for example, clinical notes or a discharge summary. This includes Notice of Decision (approval or non-approval) letters that assessors can generate and upload.
- **Other Attachments** are documents that relate to the clients' general circumstances, for instance, documents related to the establishment of a support relationship (including legal in documentation), and Occupational Therapist drawings used in home modifications. You can also view **Proof of Progression** documents in this section.
- **Correspondence** includes letters and documents generated in **My Aged Care** about Support at Home services. My Aged Care sends these letters to clients at different stages of their service journey and also sends copies to their nominated support person or people.
- **Sensitive Attachments** are documents that contain client information of a sensitive nature. For example, documents about a client's financial situation, safety concerns and legal issues that may impact the provision of services.

1. Select the **Attachments** tab to navigate to the attachments page of the client record.

2. To add an attachment, select the **ADD ATTACHMENT** button.

3. A pop-up window will appear, prompting you to find and upload the desired attachment. Search your computer for the document you wish to attach by selecting the **Choose file** button.

Provide additional details by inputting the **Name of the attachment**, choosing the **Type of attachment** from the drop-down lists, and providing a **short description**. Finally, select the **UPLOAD** button to save your attachment to the client record.

- ! Where a client record has a Sensitive Attachment and the client is referred for service provision, service provider(s) will be notified that a Sensitive Attachment exists for the client. Service providers cannot view sensitive attachments; they will be directed to contact the assessor who conducted the last assessment, or the My Aged Care Service Provider and Assessor Helpline on 1800 836 799 to access information within the Sensitive Attachment.
- Sensitive attachments are not visible through the My Aged Care online account and will be visible only to assessors and My Aged Care contact centre staff.

4. Your attachment will appear in the **Assessment Attachment** tab, or the **Correspondence** tab.

The screenshot shows the 'Attachments' page in the My Aged Care system. The top navigation bar includes 'Client summary', 'Client details', 'Support network', 'Approvals', 'Plans', and 'Attachments' (highlighted in red). Below the navigation bar, the 'Attachments' section has a sub-header 'Attachments' and a button 'ADD AN ATTACHMENT'. There are three tabs: 'Assessment Attachments' (highlighted in red), 'Other Attachments', and 'Correspondence'. Under the 'Assessment Attachments' tab, there are three items: 'Care Plan' with a file 'Care Plan [docx 10.42KB]' and a 'HIDE FROM VIEW' button; 'Action Plan - External' with a file 'Budget Plan.docx [10.42KB]'; and 'Ineligible for Assessment Ltr' with a file 'Assessment letter.docx [4.84KB]' and a 'HIDE FROM VIEW' button.

5. Sensitive attachments will appear in the **Other Attachments** tab.

The screenshot shows the 'Attachments' page in the My Aged Care system. The top navigation bar includes 'Client summary', 'Client details', 'Support network', 'Approvals', 'Plans', 'Attachments' (highlighted in blue), 'Services', and 'My Aged Care'. Below the navigation bar, the 'Attachments' section has a sub-header 'Attachments' and a button 'ADD AN ATTACHMENT'. There are three tabs: 'Assessment Attachments', 'Other Attachments' (highlighted in red), and 'Correspondence'. Under the 'Other Attachments' tab, there are four items: 'Legal documentation' with a file 'Legal document.docx [62.41KB]' and a 'HIDE FROM VIEW' button; 'Appointment of Support form' with a file 'Supporter relationship.docx [10.44KB]' and a 'HIDE FROM VIEW' button; 'Appointment of Support form' with a file 'Registration of Supporter Org.docx [10.51KB]' and a 'HIDE FROM VIEW' button; and 'Appointment of Support form' with a file 'Registration form Name.docx [10.51KB]' and a 'HIDE FROM VIEW' button.

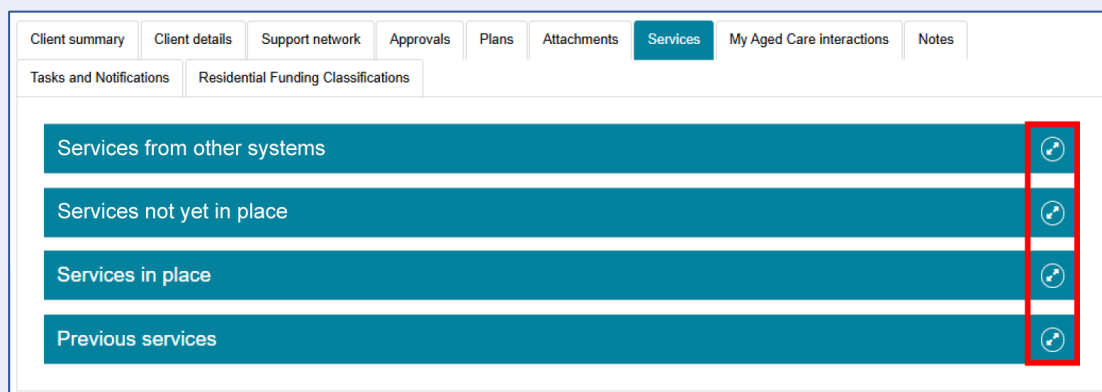
The Services tab

The **Services** tab provides a central view of the client's current and past interactions with aged care services. It helps assessors track referrals, service uptake, and provider engagement. This section is crucial for ensuring service continuity, preventing duplication of referrals, and monitoring whether the client is receiving appropriate support based on their assessed needs.

Select the Services tab to open the client's **Services** page. This page includes the following sections:

- **Services from other systems:** View records of services the client previously received in other systems. For example, clients who transitioned from Short-Term Restorative Care (STRC) can view their STRC approval records and subsidised care records in this section.
- **Services not yet in place:** View approved services that have not started.
- **Services in place:** View the services the client is currently receiving.
- **Previous services:** View services received previously.

Only sections with records appear on the page. Select the **Expand** button on the right of a section heading to display its records.



The below image shows some services in place. It contains contact details of the service provider, accepted date, start and end date, recommended start and end date, and service frequency. If applicable, the listing also shows the approval start and/or end date.

Services

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

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

Services in place

Domestic assistance - General house cleaning

Outlet name

Phone: 00 0000 0000 Start date: DD Month YYYY

Address: 1 Street Name, SUBURB STATE Postcode End date: DD Month YYYY

Email: name@email.com.au Recommended start date: DD Month YYYY

Accepted: DD Month YYYY Recommended end date: DD Month YYYY

Approval starts: DD Month YYYY Recommended service frequency: 1 days per week

Approval stops: DD Month YYYY Service frequency: 2 days per month

Associated with goal: G1

Nursing care - Enrolled nurse clinical care

Outlet name

Phone: 00 0000 0000 Start date: DD Month YYYY

Address: 1 Street Name, SUBURB STATE Postcode Recommended start date: DD Month YYYY

Email: name@email.com.au Recommended service frequency: 3 days per week

Accepted: DD Month YYYY Service frequency: 3 days per week

Approval starts: DD Month YYYY

The My Aged Care interactions tab

The My Aged Care Interactions tab shows the client's history of contact with My Aged Care. This includes appointments with **Aged Care Specialist Officers**, calls to the **My Aged Care Contact Centre**, and records of consent for callback requests to services such as **Carer Gateway** and the **National Dementia Helpline**.

This information helps assessors stay up to date with the client's interactions with My Aged Care, supports continuity of care, and reduces the risk of important communications being missed or duplicated.

For more information about the Carer Gateway and National Dementia Helpline referrals, go to [My Aged Care – Assessor Portal User Guide 2 – Registering support people and adding relationships](#).

Interactions

REFER THIS CLIENT FOR ASSESSMENT VIEW CLIENT REPORT

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

Tasks and Notifications Residential Funding Classifications

View Interaction: Show All GO

ADD INTERACTION

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

Call - Inbound Family/Friend/Carer of Exist.: Contact Centre DD Month YYYY HH:MM pm

Request for aged care services (ID: 1-000000000001)

Call outcome: Closed - System

Call - Inbound Service Provider: Contact Centre DD Month YYYY HH:MM pm

Request for Client information (ID: 1-000000000001)

The Notes tab

My Aged Care contact centre staff, Aged Care Specialist Officers, assessors, and service providers can view and add several types of notes about clients through the My Aged Care portals.

Assessors can also view and add these notes in the Aged Care Assessor App.

Refer to the tables on the following pages for information about note types and permissions according to role.

- ! All notes are subject to Freedom of Information legislation.
- ! Triage Delegates should review the notes tab prior to completing the triage process as not all information captured from screening is pre-populated.
- ! You may view client records that were transferred from another assessment outlet. This is because Department staff can transfer client records linked to an inactive assessment outlet to an active assessment outlet in the same assessment organisation or to another assessment organisation.

This means that you will view a note of the transfer in the client's My Aged Care record.

Select the **Notes** tab to navigate to the notes page of the client record. The **Notes** tab contains notes that have been created about the client. Assessors can add new notes about the client from this tab.

Notes

REFER THIS CLIENT FOR ASSESSMENT VIEW CLIENT REPORT

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

Tasks and Notifications Residential Funding Classifications

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
DD/MM/YYYY		History of Experiences	Part 2	Organisation name	Outlet name	Active
DD/MM/YYYY		History of Experiences	Part 1	Organisation name	Outlet name	Active
DD/MM/YYYY		Cultural/Religious	Cultural/Religious Note	Organisation name	Outlet name	Active
DD/MM/YYYY		Preference	Preference	Organisation name	Outlet name	Active
DD/MM/YYYY		Client Story	Client Story	Organisation name	Outlet name	Active
DD/MM/YYYY DD/MM/YYYY		Sensitive Notes	Sensitive Note	Organisation name	Outlet name	Active

Note types

This table shows a selection of important note types, their description and example text.

Note type	Description	Examples
Client story	A summary of the client's current circumstances. Assessors, My Aged Care contact centre, service providers and clients can view these notes.	Mrs Jones has just been discharged from hospital and is seeking help at home. She lives with husband and has early onset dementia.
Sensitive notes	Information of a sensitive nature about the client that needs to be available for assessment or provision of some services. A sensitive note will display a flag on the portal for the service provider against the client. They may contact the My Aged Care contact centre or assessor for additional information, which will only be provided to them if relevant to their service provision. This note will not be displayed to service providers or clients in their portals.	• Mr Smith is HIV positive. • Mrs Johns has an abusive relationship with son.
Preference	Clients stated service provision preferences. Assessors and My Aged Care contact centre staff can view these notes.	• Mrs Marten would prefer a Catholic provider. • Mr Dobruk is affiliated with the Croatian community.
Observations	Observations from service provider and/or assessor's interactions with the client. Assessors, My Aged Care contact centre staff and service providers can view these notes.	• There is a dog on the property. • Mrs Shean seems more energetic than she did during my last visit.
Referral Note	Notes accompanying a client's referral. This can be an initial referral, subsequent referral or referral from one assessment outlet to another.	This client record has now been transferred from Outlet A to Outlet B on 01/01/2024.
Other	Additional information about the client. Assessors, My Aged Care contact centre staff, service providers and clients can view these notes. Examples of other notes include: Client Story - Returned mail, Cultural/Religious, History of Experiences, Gender Identity/Sexual Pref notes.	Mrs Jones has planned respite on 01/08/2017.

! When My Aged Care contact centre staff or assessors add a **sensitive** note about a client, all service providers who are sent a referral will view a flag informing them that there is a sensitive note about the client and instruct them to call the My Aged Care contact centre or the assessor for more information. This information also appears on the client's record.

Mr Name SURNAME

Gender, XX years old, DD Month Year, AA00000001

XX Street Name, SUBURB, STATE POSTCODE

Sensitive note

Primary contact: Name Surname (Role) - 00 0000 0000

Carer: Name Surname (Role)

[View support network](#)

Note add & view permissions

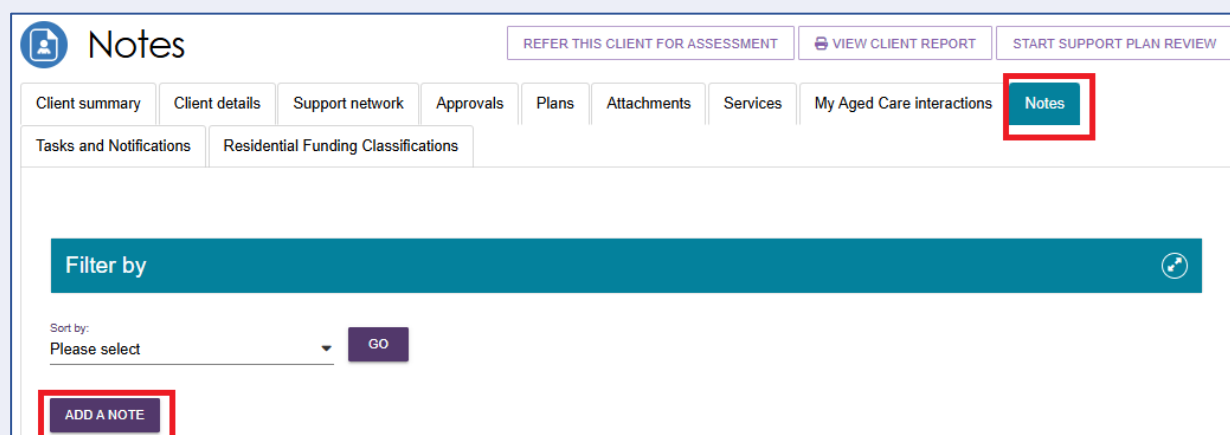
The table below shows each role in the assessor portal and their permissions to add or view a selection of note types.

Role	Add Note Types	View Note Types
Assessors	All	All
Service Providers	Observations Other	Other Client Story Observations Sensitive (Flag only, no content)
Clients (and their support network)	Other	Other Client Story
My Aged Care Contact Centre Staff	Client Story, Sensitive Notes, Preference, all "Other" notes except Observations.	All
Aged Care Specialist Officers (Face to face support in Services Australia centres)	All	All

Adding client notes

The following section outlines how to add client notes using the assessor portal. For instructions on how to add notes in the Aged Care Assessor App, refer to the [Aged Care Assessor Application User Guide](#).

1. Select the **Notes** tab to navigate to the notes page of the client record. Then, select the **ADD NOTE** button to start creating a new note.



2. A pop-up box will appear. Select the Type of the note you wish to add using the drop-down list and input the description (that is: the content of the note itself). You can hover over the help icon in the pop-up box for additional information about the note types. If you are unsure which category is most appropriate, please refer to the information in the help icon.

! You cannot delete a note once saved. Check that the information is correct before saving.

Add a note

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

Type: * ?

Please select

Please select

Client Story
Sensitive Notes
Preference
Other
Cultural/Religious
History of Experiences
Gender Identity/Sexual Pref
Observations
Hospital Note

SAVE

CANCEL

3. Select **SAVE** to finish your note.

Add a note

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

Type: * ?

Observations

End date:

(e.g. dd/mm/yyyy)

Description: *

Insert description text here

244 / 500

SAVE

CANCEL

Viewing and editing client notes

This section explains how to view and update client notes in the Assessor Portal. To learn how to view and update notes in the Aged Care Assessor App, please refer to the [Aged Care Assessor Application User Guide](#).

1. Select the **Notes** tab to navigate to the notes page of the client record. Then, select the **Edit** (pencil) icon to the right of the note you wish to edit. Note that there is no Edit icon available for Client Story notes.

Date created	End date	Note type	Description	Created by organisation	Created by outlet	Note status	
DD/MM/YYYY		Preference	Activities preference	Organisation name	Outlet name	Active	
DD/MM/YYYY		Observations	Observations of client	Organisation name	Outlet name	Active	
DD/MM/YYYY	DD/MM/YYYY	Client Story	Client Story Part 3 (2025-2026)	Organisation name	Outlet name	Active	
DD/MM/YYYY		Other	test system note	Organisation name	Outlet name	Active	

2. A pop-up box will appear. To make a note **Active** or **Inactive**, use the drop-down list to select the desired status. Then, select **SAVE** to finish your note.

Edit a note

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

Type: Other

Status: *

Active

Date created: DD/MM/YYYY HH:MM:SS AM

End date:

(e.g. dd/mm/yyyy)

Description: *

Insert description text here

Created by: , System, System

306 / 500

SAVE CANCEL

3. Client **Story notes** can also be viewed by assessors in the **Assessments** section of the assessor portal. Select the link to the **Assessments** section of the assessor portal at the very top of the page. Then, select expand a client summary by using the expand icon on the left of the row.

Name SURNAME

1 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

Completed Support Plan due by DD Month Year

Preferences
No preference was recorded

Assessment details

FNAO-preference No

Assessment type Comprehensive

Assessment reason Self-Referral

Assessment setting Non-Hospital

Assessor Name Surname

Triage conducted by Name Surname

Support plan In Progress

Comprehensive Assessment In Progress

Client story

DD/MM/YYYY

Insert description text here

VIEW ALL 1 CLIENT NOTES

Comments

VIEW FULL CLIENT RECORD **VIEW CLIENT REPORT**

! Client story notes cannot be edited after they are created. To make changes, assessors and providers can mark the original note as inactive and create a new note, helping ensure records are not lost.

If you are concerned that information in these records is incorrect, contact the My Aged Care service provider and assessor helpline on 1800 836 799.

The Tasks and Notifications tab

All tasks and notifications relevant to the client will be displayed in this page. Assessors will be able to view all tasks and notifications relevant to the client. Providers will only be able to view tasks or notifications that are associated to their assessment outlet, for clients that they are providing services to. Select the **Tasks and Notifications** tab to navigate to the interactions page of the client record.

Type	Due Date	Received Date	Category	Title/Description	Channel	Activity Id	Portal	Outlet
Notification	DD/MM/YYYY		Delegate Decision	Delegate Decision An assessment has been submitted for Delegate Decision. Details are as follows - Aged Care User Id: AA00000001 Assessor: Name Surname Go to: Decisions		1-000000000001	Assessor Portal	
Notification	DD/MM/YYYY		Referrals	New Referral You have a new referral from My Aged Care. Referral created at DD/MM/YYYY (time) for Aged Care User Id: AA00000001 Outlet name: Outlet name Assessment Type: Comprehensive Assessment Priority: Low Go to: Incoming Referrals		1-000000000001	Assessor Portal	Outlet name

For a complete view of all tasks and notifications, refer to the **Tasks and Notifications** tile assessable from the assessor portal front page.

The Residential Funding Classifications tab (clinical needs assessors)

Residential Funding Classifications are part of the Australian National Aged Care Classification (AN-ACC) system, designed to replace the Aged Care Funding Instrument (ACFI) for the purposes of allocating government funding for residential aged care. Clinical needs assessors can view the client's current AN-ACC classification, and classification history using this tab.

Select the **Residential Funding Classifications** tab to navigate to the classifications page of the client record.

Current Classification (Active)

Residential Permanent DD Month YYYY - Present
AN-ACC Classification : Class 99

Residential Respite DD Month YYYY - Present
AN-ACC Classification : Class 102

Classification History

Residential Permanent

AN-ACC Classification : Class 99 (Active) : DD Month YYYY - Present

Residential Respite

AN-ACC Classification : Class 102 (Active) : DD Month YYYY - Present

More Information

For further assistance, you can call the My Aged Care service provider and assessor helpline on 1800 836 799.