

Service and Support Portal User Guide - The client record

This guide is for Staff Members and Team Leaders who use the My Aged Care Service and Support Portal. It explains how to search for and view information in a client's record.

The client record includes client details, service referrals, assessment information, documents attached to the record, care approval details, service delivery information, client interactions with My Aged Care, and notes created about the client.

Team Leaders can use all the features available to Staff Members and have access to the same functions.

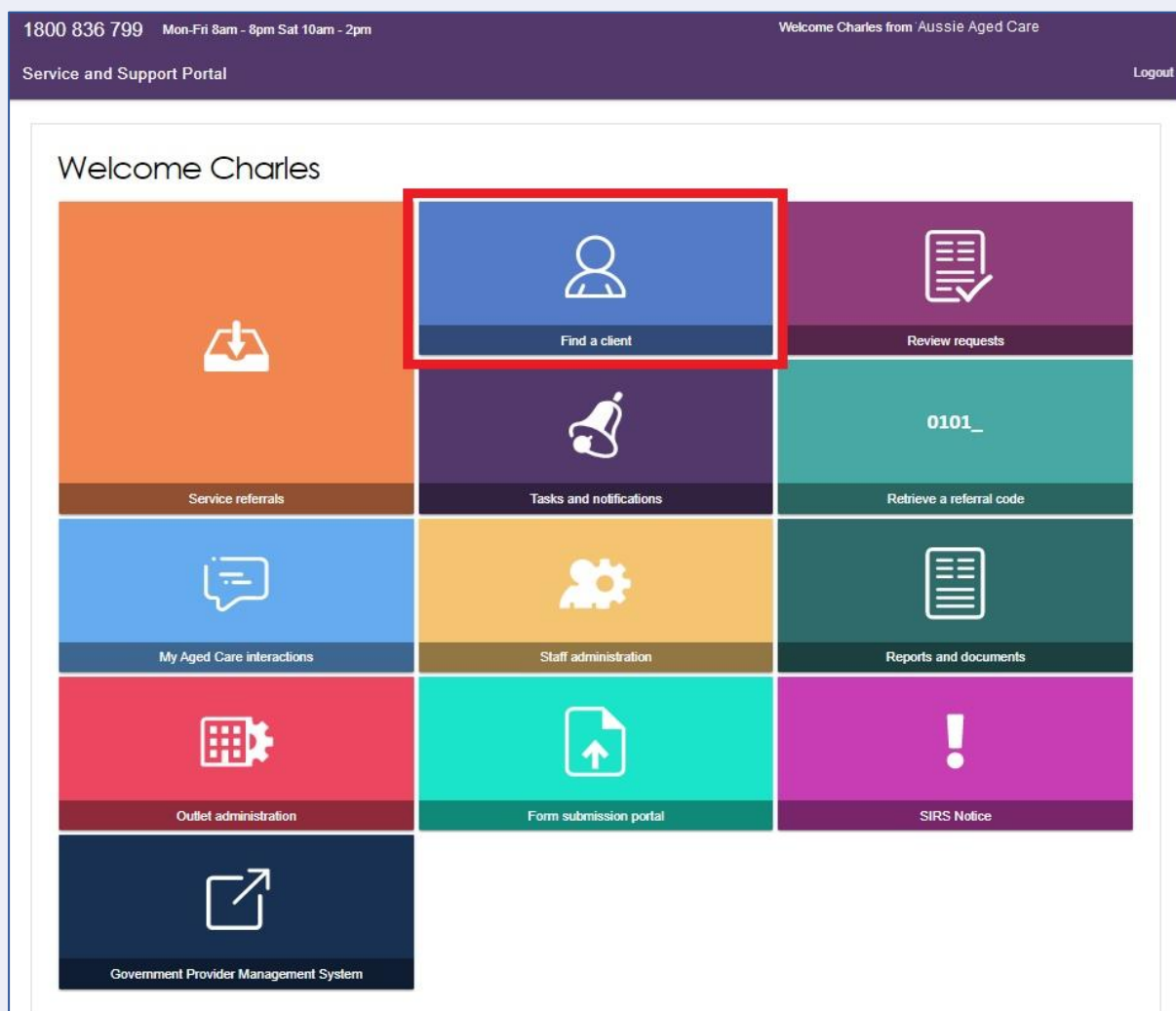
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Finding a client

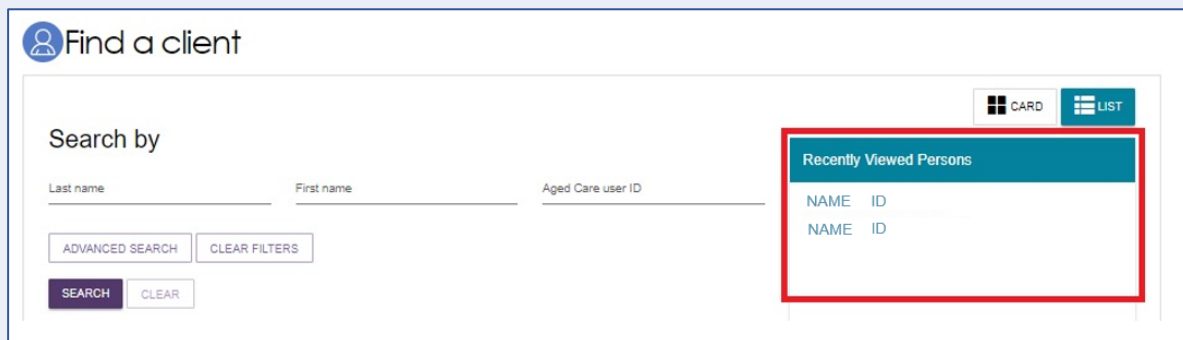
Follow these steps to find a client who has been referred to, or accepted for services by, your organisation:

1. Select **Find a client** from the home page.



2. Enter the client's **First Name**, **Last Name**, or **Aged Care User ID**, and then select **Search**. To view additional search options, select **Advanced Search**.

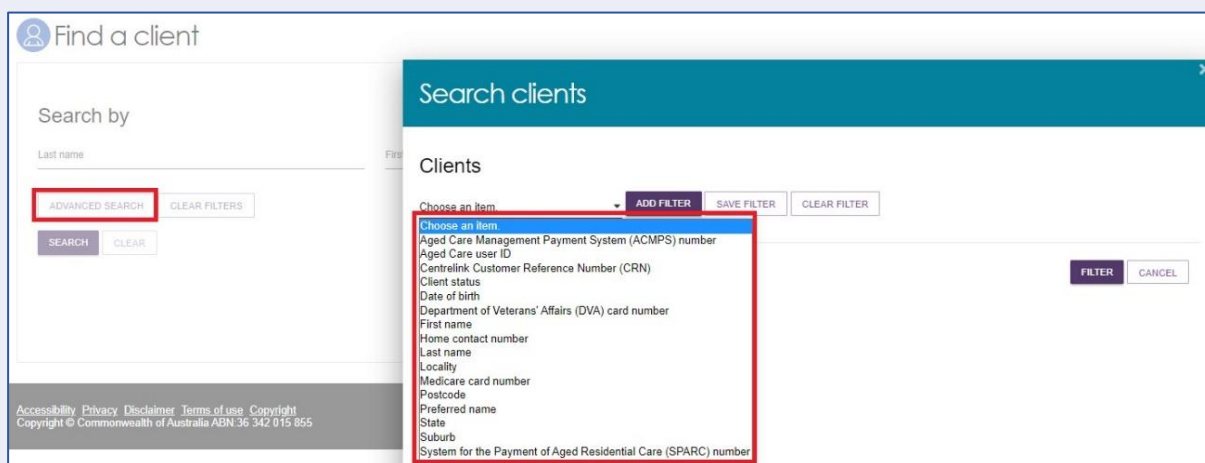
3. On the **Find a Client** page, the **Recently Viewed Persons** section shows clients you have recently accessed. Select a client's name to open their record. The system displays any matching search results.



4. Use **Advanced Search** to apply additional filters or combine multiple filters to narrow your search results.

The filters available include:

- Aged Care Management Payment System (ACMPS) number
- Centrelink Customer Reference Number (CRN)
- Client status
- Date of birth
- Department of Veterans' Affairs (DVA) card number
- Home contact number
- Locality
- Medicare Card number
- Postcode
- Preferred name
- State
- Suburb
- System for the Payment of Aged Residential Care (SPARC) number.



Viewing client information

After you find the client, you can view the information in the client's record. You can view all client information except contact details before you accept a referral.

1. Select the client record using one of three ways.
 - a) Select the client's name from the search results.

The screenshot shows the 'Find a client' interface in List View. The search criteria are 'Last name: Client'. The results table has columns: Last name, First name, Aged care user ID, Address, Locality, Status, and Home contact number. Two results are shown: 'Client Clara' with ID AC9833813 and 'Client Clay' with ID AC78848314. The 'Client Clara' row is highlighted with a red box.

Last name	First name	Aged care user ID	Address	Locality	Status	Home contact number
Client	Clara	AC9833813	1 Customer Road	PERTH, WA 6000	Active	0412 345 678
Client	Clay	AC78848314	3/15 Customer Street	BRISBANE, QLD 4000	Active	07 9876 5432

- b) In the **Find a Client** section, select the client's name when using **Card View**.

The screenshot shows the 'Find a client' interface in Card View. The search criteria are 'Last name: Client'. The results are displayed as cards. The first card is highlighted with a red box. Each card shows the client's name, address, phone number, and status.

NAME	ADDRESS	PHONE NUMBER	Aged care user ID	ID	Status
Client Clara	1 Customer Road	0412 345 678	AC9833813	AC9833813	Active
Client Clay	3/15 Customer Street	07 9876 5432	AC78848314	AC78848314	Active

- c) Select **Service Referrals**, then:
 - select the expansion arrow on the client card in **Card View**, or
 - select the expansion arrow next to the record in **List View**,then select **View Client Record**.

Card view

The screenshot shows the 'Incoming referrals' section in Card View. The search criteria are 'Filter by: Date Referred'. The results are displayed as cards. The first card is highlighted with a red box. Each card shows the client's name, address, phone number, and status.

NAME	ADDRESS	PHONE NUMBER	Aged care user ID	ID	Status
Client Clara	1 Customer Road	0412 345 678	AC9833813	AC9833813	Active
Client Clay	3/15 Customer Street	07 9876 5432	AC78848314	AC78848314	Active

List view

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

Service and Support Portal

Welcome Jordan from ABC Aged Care

Review requests Service referrals Referrals a referral code Residential care Find a client Reports and documents Tasks and notifications My Aged Care interactions Log out

Home | Service referrals

Incoming referrals

Incoming referrals Waitlist Accepted services pending Services in place Referral history

Filter by

1 to 17 out of 17 matching results

CLIENT	NAME	ID	Due date	Referred date	Service type	Recommended start date	Priority
93	DOB	Female	28 Jul 2019	26 Jul 2019	Transition Care, 6297: After Hospital Care, Other Transition Services		High (147 days overdue)

About this referral
 Outset: ABC Healthcare
 Date referred: 26 July 2019
 Date due: 28 July 2019
 Referral comments:

About this service
 Service type: Transition Care
 Service sub type: After Hospital Care, Other Transition Services
 Service item name: ABC Healthcare
 Naps service ID: ID

Approval details
 Approval start date: 26 July 2019
 Entry period end date: 23 August 2019

VIEW REFERRAL SUMMARY AND CLIENT RECORD

ACCEPT REFERRAL REJECT REFERRAL

2. The **Referrals for my organisation** page will be displayed.

Referral summary for NAME

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

Referrals for my organisation

SEE SERVICE DETAILS

Support at Home

Referral Accepted on 18 June 2024

About this referral
 Issued Date: 28 May 2024
 Due Date: 31 May 2024

About this service
 Home support Ongoing - Transitioned HCP Level 2

Priority Medium

What information is in the client record?

The client record displays client information across 12 tabs. Each tab contains different information about the client and is described in more detail below.

The client record includes the following tabs:

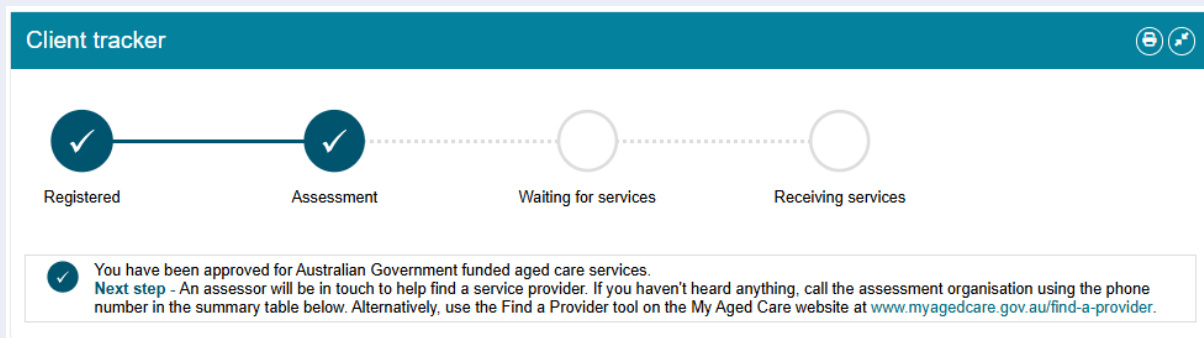
- Client Summary
- Client Details
- Support network
- Referrals for my Organisation
- Plans
- Attachments
- Approvals
- Services
- My Aged Care interactions
- Notes
- Tasks and Notifications
- Residential Care.

Client Summary

Client summary	Client details	Support Network	Referrals for my organisation	Plans	Attachments
Approvals	Services	My Aged Care interactions	Notes	Tasks and Notifications	Residential Care

The **Client summary** tab contains a dashboard of key information about the client's interactions with My Aged Care.

The Client tracker section shows 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.



The Client summary section includes information about:

- Assessments.
- Recommendations and Approvals
- Urgency and Priority categories for residential care clients
- Service recommendations
- Service delivery status
- Client goals
- Reablement and linking support periods, where available).

Client summary

Assessments

Comprehensive Assessment Finalised on 26 July 2018 Pulse Comp ACAT	Home Support Assessment Finalised on 7 March 2017 Pulse Home Support	Screening Complete on 23 February 2017
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Recommendations and approvals

Support at Home
Home support Ongoing - Transitioned HCP Level 3
[View support at home letters](#)
[SEE SERVICE DETAILS](#)

Service delivery status

Home support Ongoing - Transitioned HCP Level 3 Funding assigned 5 February 2019

- Referral issued on 1 March 2019 - Pulse Home Support
- Referral accepted on 1 March 2019 - Pulse Home Support

Concerns

I am blind and my mobility with the cane is getting worse

Goals

To receive an Assistance Dog Status: In Progress

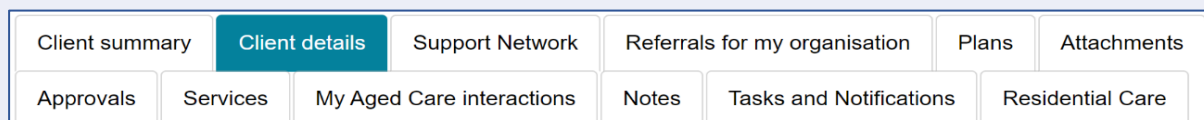
To print the Client Summary information, select **Print Page** on the right side of the relevant heading. The information prints in the same format shown in the portal.

To expand the Client Summary section, select the **double-arrow icon** next to the Print Page icon.

You can use these two features on any tab in the client record page.



Client Details

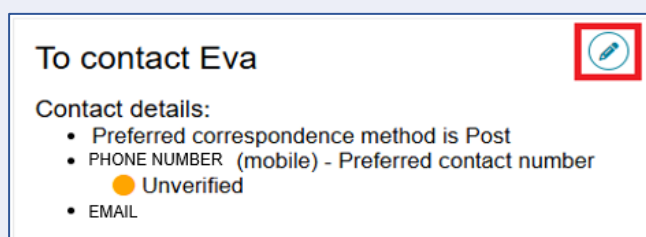


The **Client Details** tab provides the client's basic personal and contact information. It also shows summary information about active support plans, services, current notes, and primary contact details.

You can also use this tab to notify My Aged Care when a client has passed away.

The **Primary Contact** is usually the client. However, the client can nominate another person, such as an agent or registered supporter, as the primary contact. This information helps assessors, My Aged Care contact centre staff, Aged Care Specialist Officers, and service providers identify the main contact for the client. It does not affect any system-generated correspondence that My Aged Care sends to the client.

To update client information, select the **Edit (pencil) icon** next to any section that allows editing.



My Aged Care can send **email and SMS notifications** to clients and members of their [support network](#) (except Supporters Lite) when the client reaches key stages in their aged care journey. These stages include:

- completing client registration
- finalising an assessment
- approving the client for care after a comprehensive assessment
- assigning a service under the Support at Home Program
- submitting a Support Plan Review request
- activating, declining, inactivating, or approaching the expiry of a support relationship
- submitting or processing documents related to a support relationship
- generating a Support at Home letter, such as a funding allocation or withdrawal letter.

Clients, registered supporters who are authorised to receive the client's information automatically, and relevant support people automatically receive copies of **Support at Home letters**.

Registered supporters can stop receiving these letters by contacting My Aged Care.

When My Aged Care generates a Support at Home letter, it sends a notification to the client and the relevant people in the client's support network:

- Supporter
- Supporter Manager
- Agent
- Agent Manager
- Organisation Supporter
- Organisation Agent.

! When you mark a client as **Deceased**, the system changes the client record to **read-only**. You cannot edit the client's information after this change.

You can still add notes and attachments to the client record, and you can finalise assessments after updating the client's status.

The system displays a **Deceased** status banner on every tab of the client record.

If the Deceased status is incorrect, contact the **Service Provider and Assessor Helpline** on **1800 836 799**.



Support Network

Client summary	Client details	Support Network	Referrals for my organisation	Plans	Attachments
Approvals	Services	My Aged Care interactions	Notes	Tasks and Notifications	Residential Care

The **Support Network** tab shows the people and organisations that support the client throughout their aged care journey.

The client's support network can include:

- registered supporters (individuals and organisations)
- Supporter Lite contacts
- agents (organisations)
- carers
- emergency contacts
- GPs
- support persons.

Supporter guardians can choose not to let My Aged Care send letters to the client. However, supporter guardians must continue to receive these letters themselves and cannot opt out.

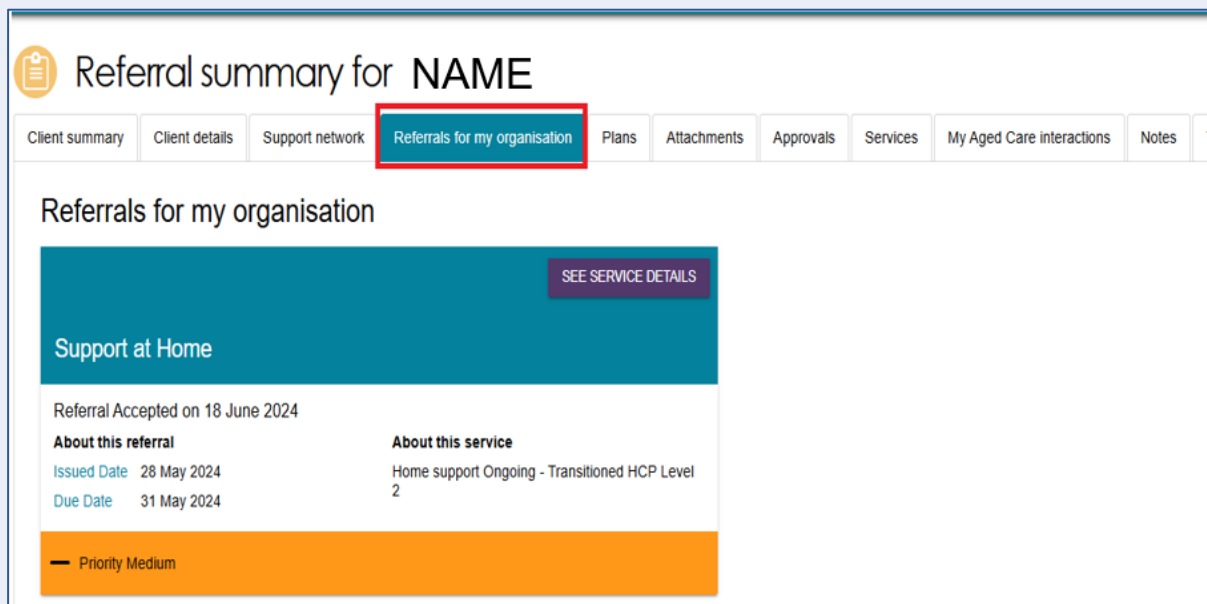
You can also use the **Support Network** tab to notify My Aged Care when a person listed in the client's support network has died.

Carers listed in the **Support Network** tab can request callbacks from the [Carer Gateway](#) and the [Dementia Australia - National Dementia Helpline](#).

Referrals for my organisation

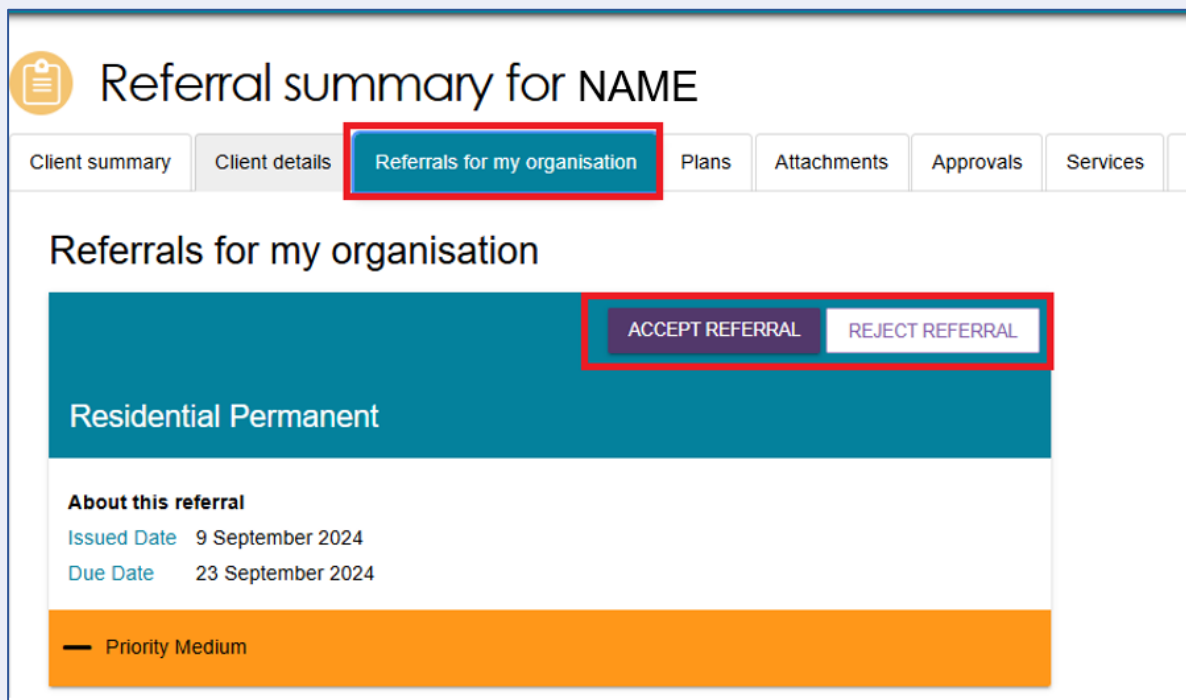
The **Referrals for My Organisation** tab shows all service referrals that your organisation has received or accepted.

This tab helps you view and manage referrals and identify any referrals that require action.



The screenshot shows the 'Referral summary for NAME' page. The 'Referrals for my organisation' tab is selected and highlighted with a red box. Below the tab, the heading 'Referrals for my organisation' is followed by a card for 'Support at Home'. The card includes a 'SEE SERVICE DETAILS' button, the text 'Referral Accepted on 18 June 2024', and two sections: 'About this referral' (Issued Date: 28 May 2024, Due Date: 31 May 2024) and 'About this service' (Home support Ongoing - Transitioned HCP Level 2). A priority bar at the bottom indicates 'Priority Medium'.

This example shows a referral that requires action. Use the **ACCEPT REFERRAL** or **REJECT REFERRAL** button to respond to the referral.



The screenshot shows the 'Referral summary for NAME' page. The 'Referrals for my organisation' tab is selected and highlighted with a red box. Below the tab, the heading 'Referrals for my organisation' is followed by a card for 'Residential Permanent'. The card includes two buttons, 'ACCEPT REFERRAL' and 'REJECT REFERRAL', which are also highlighted with a red box. Below the buttons, the card includes the text 'About this referral' (Issued Date: 9 September 2024, Due Date: 23 September 2024) and a priority bar at the bottom indicating 'Priority Medium'.

Plans

The **Plans** tab provides detailed information about the client's current and previous screenings and assessments. It includes the client's goals, recommendations, motivations, and support plan.

To view more information, select the **double-arrow icon** next to a heading. The system will display the detailed information recorded during the assessment.

Client summary
Client details
Referrals for my organisation
Plans
Attachments
Approvals
Services
My Aged Care interactions
Notes
Tasks and Notifications

Assessment Details

- Assessment information
- Assessment summary
- Needs identified at assessment
- Assessment history

Plan Details

- Current care approvals
- Goal and recommendations
- Other recommendations
- People associated with the support plan
- Plans history
- Review history
- Reablement and linking support history

The Plans tab allows providers to view a client's support plan, previous screenings, and assessments in read-only mode. Providers can print this information when required.




NAME
Aged Care ID: ID
Date of Birth: DOB

Client Details

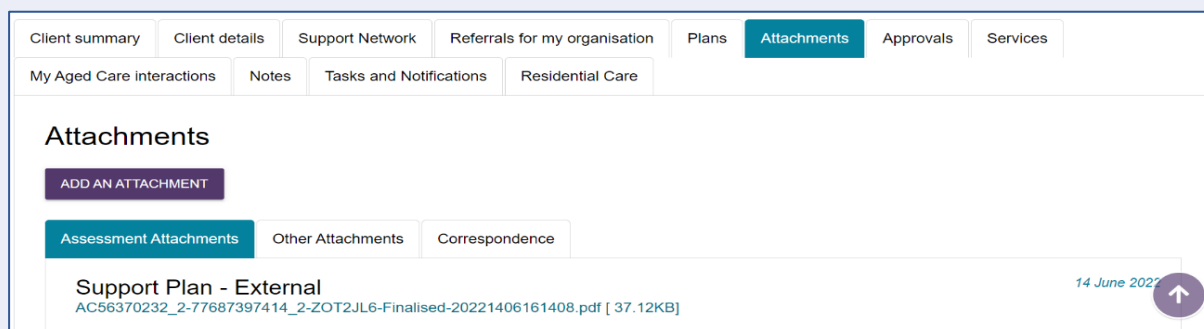
Age	70	Gender	Female
Medicare number	not applicable	DVA Card number	not applicable
Address	ADDRESS		

Lives With	With friends	Accommodation type	PR Relation Owns/Purchasing
Phone – Home	PHONE NUMBER	Phone – Mobile	not applicable
Email	EMAIL	Fax	not applicable
Preferred phone	Home	Preferred correspondence method	not applicable
Country of Birth	India	Ethnicity	Central Asian
Preferred Language	English	Requires Help to Communicate	not applicable
TIS Required	not applicable	NRS Required	N
Marital status	Never married	Aboriginal and/or Torres Strait Islander Status	No - Neither
Veteran or War Widow/Widower	not applicable	DVA Entitlement	not applicable
Private health insurance	not applicable	Receiving payments	not applicable

Attachments

The **Attachments** tab stores documents attached to the client record. You can also use this tab to add new documents.

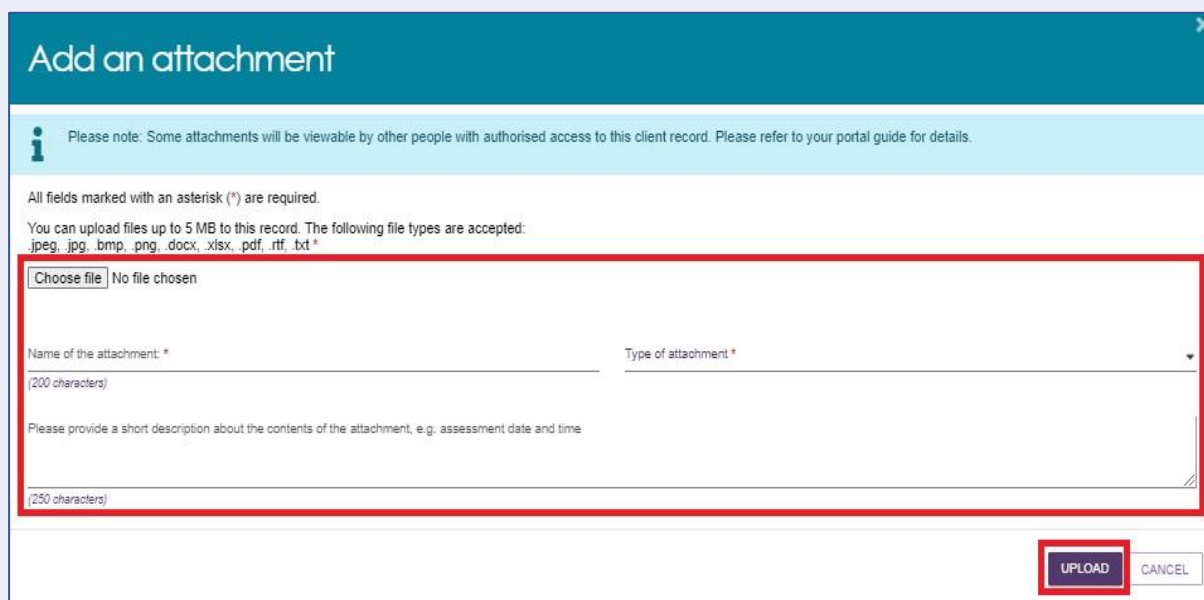
1. Select **Add an Attachment** from the Attachments page.



2. Select **Choose File** and select the document you want to upload.

Enter the required information, including the attachment name and document type.

Select **Upload** to add the document to the client record.



The **Type of Attachment** drop down menu includes the following options:

Assessment Attachments: Upload documents that support the client's assessment, such as clinical notes or discharge summaries.

Other Attachments: Upload documents related to the client's circumstances, including:

- documents that establish a support relationship, such as legal documents or an Appointment of Support Person or Organisation form
- occupational therapist drawings used for home modifications
- documents that support a request to extend a home modifications approval period.

You can view a client's Statement of Reasons in this section, but you cannot upload it.

Correspondence: This category contains letters and documents generated in My Aged Care for Home Support and Residential Care services. My Aged Care sends these letters to clients at different stages of their care journey and may also send copies to registered supporters.

Sensitive Attachments: they contain information that requires additional protection, such as:

- financial information
- safety concerns
- legal matters that may affect service delivery.

! If a client record contains a **Sensitive Attachment**, service providers who receive a referral for the client or provide services to the client will see a notification that a Sensitive Attachment exists. Contact the assessor or the **My Aged Care Service Provider and Assessor Helpline** for more information about a Sensitive Attachment.

If someone uploads an attachment by mistake, contact the **My Aged Care Service Provider and Assessor Helpline** on **1800 836 799** to request its removal.

Approvals

The **Approvals** tab shows the client's approvals for aged care services under both the Aged Care Act 2024 and the Aged Care Act 1997. This tab also includes approvals that were recorded before My Aged Care began, where the client's record links to Services Australia systems, such as Centrelink and Medicare.

If the client has a Home Support service approval, the **Current Care Approvals** section displays the approved classifications and any short-term pathways.

The example below shows how Home Support services and non-Support at Home services appear when you expand the approval details.

The screenshot displays the 'Care approvals' section of a web application. At the top, there's a header with a logo and the title 'Care approvals'. To the right of the title are two buttons: 'REQUEST A REVIEW' and 'VIEW CLIENT REPORT'. Below the header is a navigation bar with tabs: 'Client summary', 'Client details', 'Support network', 'Referrals for my organisation', 'Plans', 'Attachments', 'Approvals' (which is highlighted), and 'Services'. Under the 'Approvals' tab, there are sub-tabs: 'My Aged Care interactions', 'Notes', and 'Tasks and Notifications'. The main content area is titled 'Approvals' and includes a sub-header 'The client is approved for the following care types under the Aged Care Act 2024.' Below this is a section titled 'Current care approvals'. It contains three main items, each with a circular icon and a title: 1. 'Allied health and therapy' with a green bar indicating 'Delegate decision completed' and an 'Approval start date' of '24 May 2026'. 2. 'Assistive technology Ongoing - Specified needs - Assistance Dogs' with a 'VIEW HISTORY' button. 3. 'Home support Ongoing - SaH Classification 3' with a 'VIEW HISTORY' button. Below the third item is a detailed list of attributes: 'Priority category' (Standard), 'Approval starts' (24 May 2026), 'Status' (Withdrawn effective 1 June 2026), 'Place assigned' (FSO), 'Take up deadline' (27 July 2026), 'Source System' (Gateway), 'Home support services' (with a circular icon), and 'Not seeking services'. At the bottom of the main content area, it says 'Previous care approvals' and 'DHS prior approvals last updated: Never'.

Services

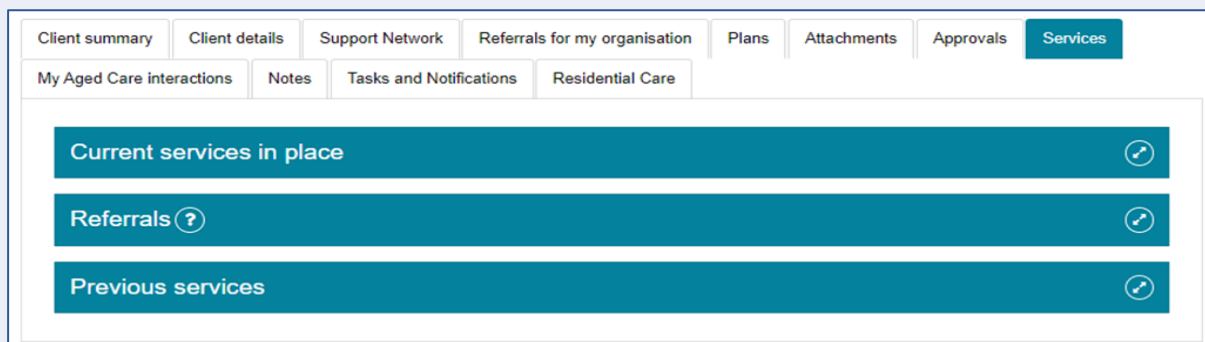
The **Services** tab shows the client's current, pending, and past services. Select the expand icon



next to each item to view the details:

The tab includes:

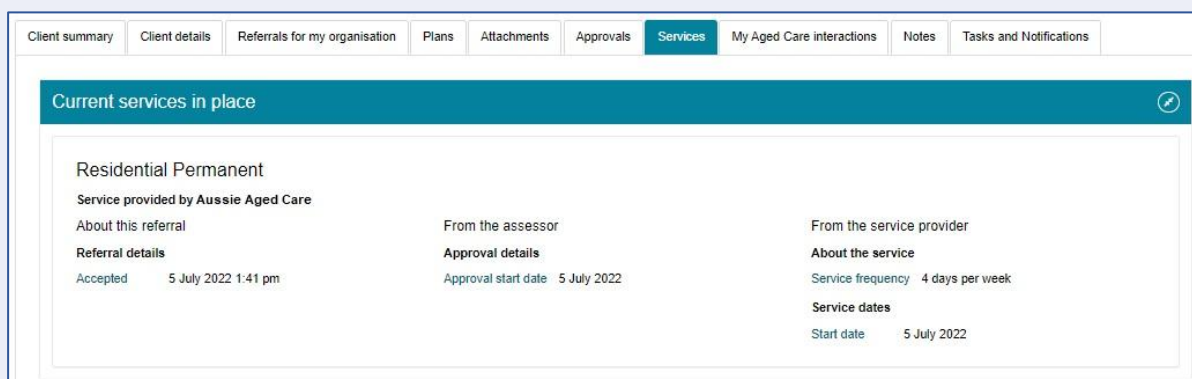
- services the client is currently receiving
- services that are pending and not yet in place
- service referrals that providers have not yet accepted
- services the client received in the past
- services recorded in other systems that My Aged Care does not manage.



! Updating service delivery information is not available for clients referred to Support at Home services, as service information is already recommended and approved during the assessment.

The following images show a client with a Residential Permanent service in place and a Support at Home service in place.

Residential Permanent service in place



Support at Home service in place

Client summaryClient detailsSupport networkReferrals for my organisationPlansAttachmentsApprovals

ServicesMy Aged Care interactionsNotesTasks and NotificationsResidential Care

Current services in place

Support at Home

Service provided by NAME

About this referral

Referral details

Home Support Ongoing - SaH
Classification 4

Assistive Technology Ongoing -
Specified needs - Continence
Products

Accepted24 June 2025 11:54
am

SEE SERVICE DETAILS

From the assessor

Recommended dates

From the service provider

About the service

Assistive Technology

Service commenced24 June 2025

My Aged Care interactions

Use the My Aged Care Interactions tab to view the client's past interactions with My Aged Care, including contact centre enquiries and phone calls.

If applicable, the tab also shows interactions with the Carer Gateway and the National Dementia Helpline.

Client summaryClient detailsSupport NetworkReferrals for my organisationPlansAttachmentsApprovalsServices

My Aged Care interactionsNotesTasks and NotificationsResidential Care

Notes

The Notes tab shows all notes recorded about the client.

Client summaryClient detailsSupport NetworkReferrals for my organisationPlansAttachmentsApprovalsServices

My Aged Care interactionsNotesTasks and NotificationsResidential Care

Filter by

Note type

Note status

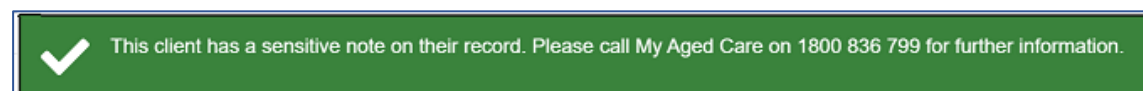
ADVANCED SEARCH

CLEAR FILTERS

The table below describes the different types of notes available.

Note type	Who can add?	Who can view?	Description	Examples
Client story	Assessor	Client Assessor Provider	A summary of the client's current circumstances.	Mrs Jones has just been discharged from hospital and is seeking help at home. Lives with her husband and has early onset dementia.
Observations	Provider Assessor	Provider Assessor	Observations from service provider and/or assessors' interactions with the client.	There is a dog on the property. Mrs Smith seems more energetic than she did during my last visit.
Other	Client Provider Assessor	Client Provider Assessor	Additional information about the client.	Jennifer has planned respite on 01/08/2017.

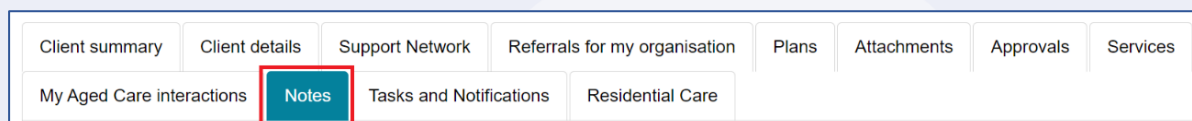
! If My Aged Care contact centre staff or assessors add a **Sensitive Note** to a client's record, providers who receive a referral for that client will see a Sensitive Note alert. To access more information, providers must contact the My Aged Care contact centre.



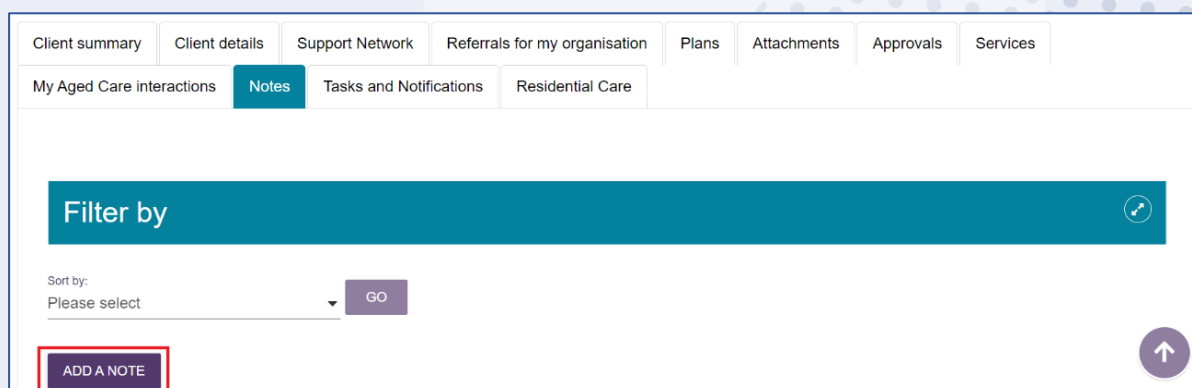
Viewing and adding client notes

Follow these steps to add a note to a client record:

1. Open the client's record and select the **Notes** tab.



2. Review the existing notes, then select **Add a Note**.



3. In the pop-up window, select a **Note Type** and enter a description. Select **Save** to add the note to the client record.

The help icon  in the pop-up window explains the different note types and helps you choose the most appropriate category.

Staff Members, Team Leaders, and service providers using the **Service and Support Portal** can add notes, but they cannot edit, delete, or inactivate existing notes.

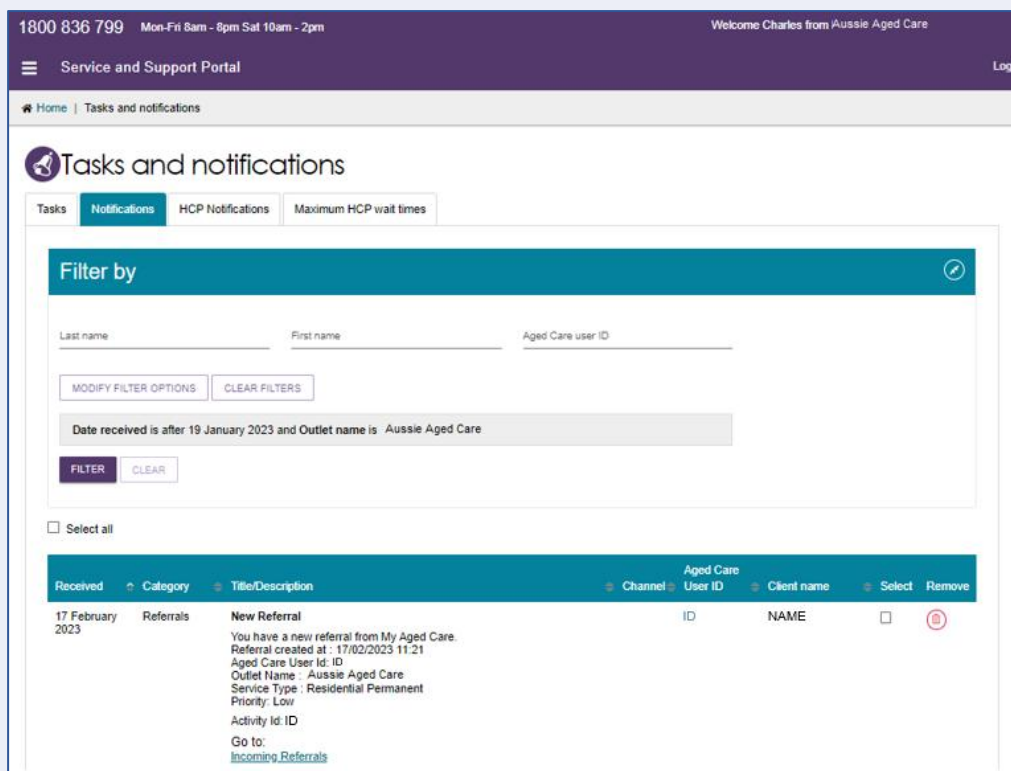


Tasks and notifications

The **Tasks and Notifications** tab shows all tasks and notifications for a single client.

You can only see tasks and notifications that relate to your outlet and to clients you provide services for.

The image below shows a notification when a new referral is created between a client and a Service and Support outlet.



Residential Care

This section shows information for clients living in **Residential Permanent Care** or **Residential Respite Care** who have received an **Australian National Aged Care Classification (AN-ACC)** assessment or are currently having an AN-ACC assessment.

Client summary	Client details	Support Network	Referrals for my organisation	Plans	Attachments	Approvals	Services
My Aged Care interactions	Notes	Tasks and Notifications	Residential Care				

Current Classification (Active)

Residential Permanent 14 June 2022 - Present
AN-ACC Classification : Class 99

Classification History

Residential Permanent

AN-ACC Classification : Class 99 (Active) : 14 June 2022 - Present

For more information or support

You can find more information on the [My Aged Care for Service Providers](#) page on the Department's website.

If you need help, call the My Aged Care Service Provider and Assessor Helpline on 1800 836 799. The helpline is available Monday to Friday from 8:00 am to 8:00 pm and Saturday from 10:00 am to 2:00 pm.