

Service and Support Portal User Guide - Managing Referrals for Service

This guide is for **Team Leaders** who use the My Aged Care Service and Support Portal. It explains how to manage referrals.

Each provider outlet must have at least one person with the Team Leader role in the portal.

The Team Leader manages referrals for services. This includes accepting referrals, placing referrals on a waitlist, rejecting referrals, and revoking referrals after acceptance.

Table of Contents

Introduction	2
Viewing and searching for referrals.....	2
Accepting or rejecting a referral for service	7
Accepting a referral	12
Rejecting a referral	15
Revoking an accepted referral	18
Revoking a referral - client deceased.....	21
Accepting a Referral to Waitlist	22
Retrieving a Referral Code	23
Drawing a Client into Service from a Waitlist.....	26
Notifications for Overdue Referrals	28
Referral History.....	29
Referral Priority Status	30
More Information and Support	31

Introduction

Service providers can receive referrals for services in the following ways:

- Clients with existing care approvals under the **Aged Care Act 2024** and a referral code can contact service providers directly.
- Service providers can receive electronic referrals through the **My Aged Care portal** issued by an assessor directly or by broadcast.

This guide explains each referral pathway in more detail.

For more information about managing referrals, refer to the [My Aged Care Service and Support Portal user guide: Part 2 - Team leader and staff member functions](#).

! All clients with existing approvals should be registered in My Aged Care. Please contact the My Aged Care Assessor and Service Provider helpline on 1800 836 799 for further assistance.

! **Support at Home referrals**

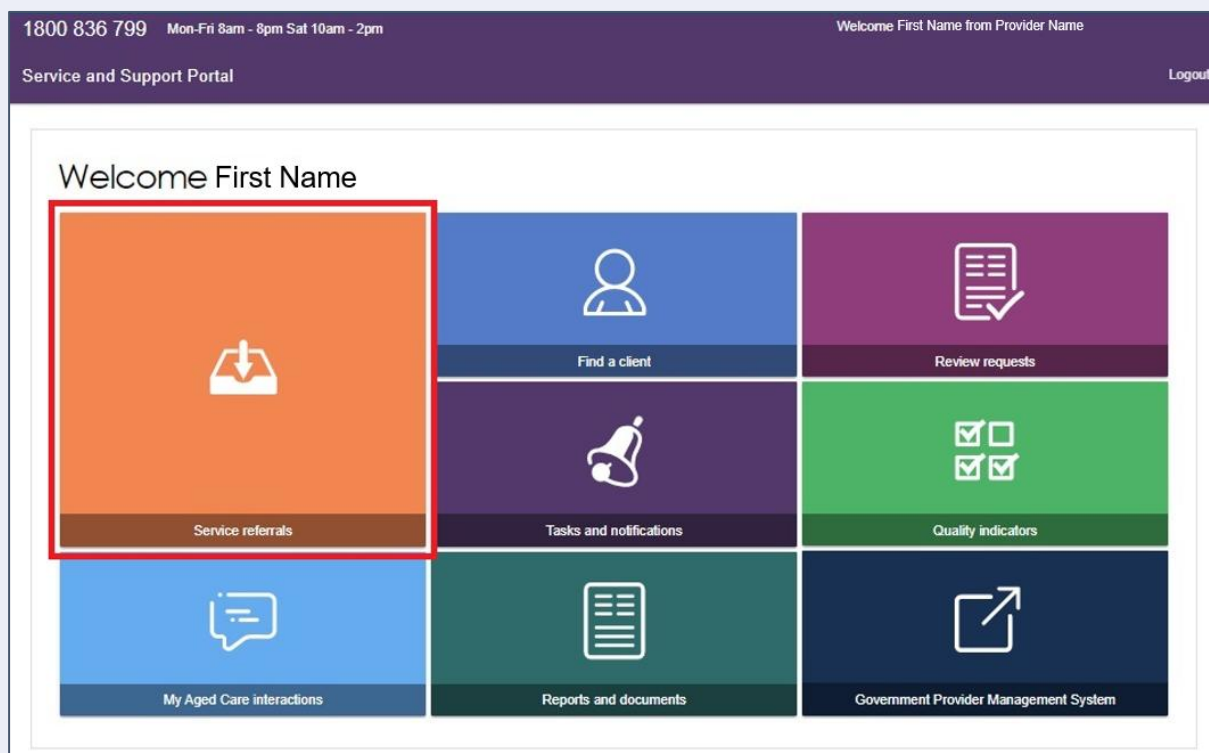
Support at Home referrals can include more than one service type and service.

Providers receive referrals either through the portal or by a referral code, depending on the client's preference.

Each incoming referral includes a priority level: **low, medium, or high**.

Viewing and searching for referrals

1. From the homepage, select **Service Referrals**.



Team Leaders and Staff Members can view referrals. Only Team Leaders can:

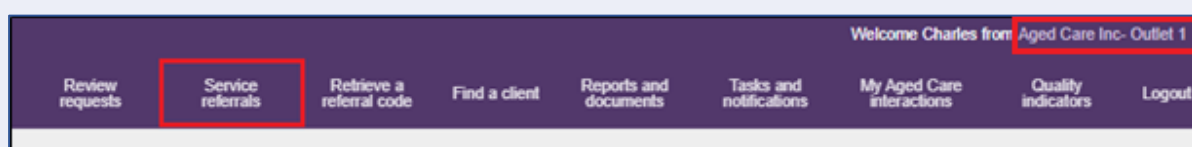
- Accept referrals
- Add referrals to a waitlist
- Reject referrals
- Revoke referrals after they have been accepted.

You may have more than one role in the Portal. The tiles displayed on your homepage will depend on your assigned role or roles.

You can also access **Service Referrals** from the toolbar at the top of the Service and Support Portal from any page.

2. Before searching for referrals, make sure you have selected the correct outlet.

To change outlets, select the outlet name in the top-right corner of the portal, next to the **Logout** link, and choose the relevant outlet. This ensures you view referrals for the correct outlet.



3. The **Incoming Referrals** page shows all referrals that have not yet been actioned.

You can switch between Card View and List View using the toggle at the top of the page.

LIST VIEW

A screenshot of the 'Incoming referrals' page in list view. The page has a white background with a purple header. The 'Incoming referrals' tab is highlighted with a red box. To the right, there are tabs for 'Waitlist', 'Accepted services pending', 'Services in place', and 'Referral history'. A toggle switch at the top right shows 'CARD' and 'LIST' (selected, highlighted with a red box). Below the toggle is a 'Filter by' search bar. A table displays 15 matching results. The table has columns: Last name, First name, Aged care user ID, Due date, Referred date, Service type, Recommended start date, and Priority. The first five rows are visible, showing various referral details and priorities (High, Low, Medium).

Last name	First name	Aged care user ID	Due date	Referred date	Service type	Recommended start date	Priority
LAST NAME	First Name	ACxxxxxxx1			Residential Permanent, 1139		High (288 days overdue)
LAST NAME	First Name	ACxxxxxxx2			Allied Health and Therapy Services, 26700		Low (270 days overdue)
LAST NAME	First Name	ACxxxxxxx3			Residential Permanent, 1139		Medium (270 days overdue)
LAST NAME	First Name	ACxxxxxxx4			Allied Health and Therapy Services, 26700		High (266 days overdue)
LAST NAME	First Name	ACxxxxxxx5			Allied Health and Therapy Services, 26700		Low (181 days overdue)

CARD VIEW

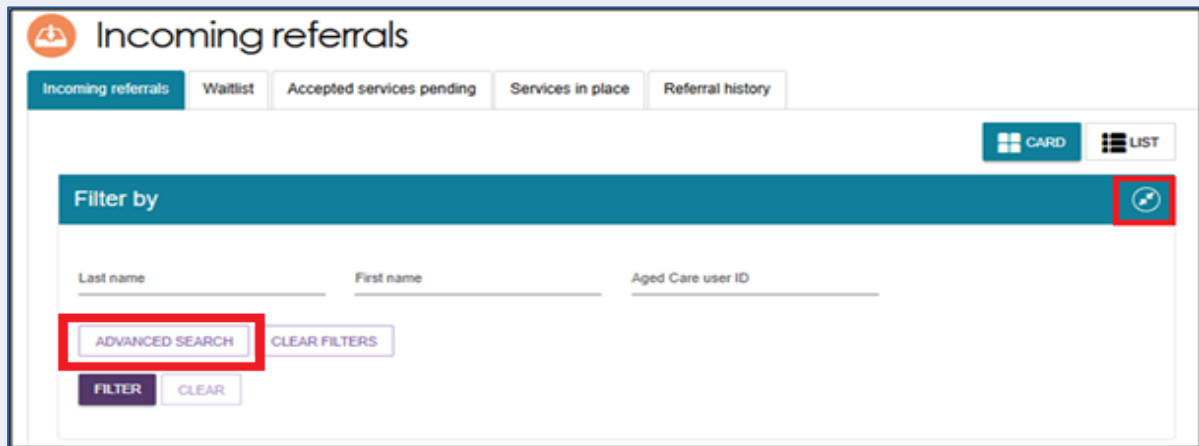
4. Select the **Expand** icon (double arrows) next to a client's record in either Card View or List View to see more information about the referral.

For **Support at Home** referrals, the expanded view shows all Support at Home classifications assigned to or approved for the client, along with the funding status for each classification.

5. To find a specific client, enter the client's **first name**, **last name**, or **Aged Care User ID** in the search field.

To view filter options, select the **Expand** icon (double arrows) on the right side of the filter bar.

To search using additional criteria, select **Advanced Search**. The **Search Incoming Referrals** window will open.



6. In the Optional Filter Field drop-down list, select a filter and then choose Add Filter to apply it to your search.

You can save your selected filters by choosing Save Filter. This lets you quickly reuse them from the Advanced Search option.

Available filters include:

- Aged Care User ID
- Due Date
- First Name
- Last Name
- Locality
- Outlet
- Postcode
- Priority
- Recommended Start Date
- Referred Date
- Service Type
- State
- Suburb.

Search incoming referrals

Incoming referrals

Choose an item. ▾

Choose an item.

- Aged Care user ID
- Due date
- First name
- Last name
- Locality
- Outlet
- Postcode
- Priority
- Recommended start date
- Referred date
- Referred for
- State
- Suburb

ADD FILTER SAVE FILTER CLEAR FILTER

FILTER CANCEL

When you have finished adding filters, select **Filter**.

Search incoming referrals

Incoming referrals

2 of 7 filters used

Last name Postcode

FILTER CANCEL

7. You can sort incoming referrals using any of the following fields:

- Client Last Name
- Client First Name
- Aged Care User ID
- Suburb
- State
- Postcode
- Locality
- Date Referred

- Due Date
- Recommended Start Date
- Priority
- Service Type.

You can sort the results in **ascending or descending order**, or **alphabetically from A to Z or Z to A**, depending on the field you select.

The screenshot shows the 'Incoming referrals' section of a web portal. It includes tabs for 'Incoming referrals', 'Waitlist', 'Accepted services pending', 'Services in place', and 'Referral history'. There are 'CARD' and 'LIST' view toggles. A 'Filter by' bar is present. Below it, a sorting dropdown is highlighted with a red box, showing 'Sort Referrals by: Date Referred' and 'in order of: Latest to Earliest'. A 'GO' button is next to the dropdown. Below the dropdown, it says 'Current sort order is Date Referred'.

Accepting or rejecting a referral for service

1. To accept a referral, select **Service Referrals** from:

- the homepage
- the toolbar at the top of the portal, or
- the sidebar menu in the top-left corner of the portal.

For **Support at Home** services, providers can view the referral code that has been issued to the client once funding has been assigned. Providers should also check the **take-up deadline**. You must start services before this date, or the client's funding may be withdrawn.

! Waitlist referrals are no longer sent as a separate referral type. If a waitlist is available for the referred service, a Team Leader can either:

- accept the referral and start services immediately, or
- accept the referral onto the waitlist.

2. From the **Incoming Referrals** tab in **Service Referrals**:

- In Card View, select the Expand icon (double arrows) at the top-right corner of the referral.

The screenshot shows two referral cards in Card View. Each card has a header with 'First Name' and 'LAST NAME'. Below the header, there is a location pin icon followed by 'SUBURB, STATE, XXXX', an 'Aged care user ID: ACXXXXXXXXX1', 'Date referred: DD Month Year', 'Due date: DD Month Year', and 'Outlet: Example Outlet - Support At Home'. The left card has a green status bar at the bottom that says 'Low (13 days overdue)'. The right card has a red status bar at the bottom that says 'High (69 days overdue)'. Both cards have an 'Expand' icon (double arrows) in the top-right corner, which is highlighted with a red box.

- In List View, select the **Expand** icon (double arrows) on the left side of the referral.



Incoming referrals

[Incoming referrals](#)
[Waitlist](#)
[Accepted services pending](#)
[Services in place](#)
[Referral history](#)

CARD

LIST

Filter by

1 to 50 out of 335 matching results

Last name	First name	Aged care user ID	Due date	Referred date	Referred for	Recommended start date	Priority
LAST NAME	First Name	ACXXXXXX1			Support at Home, 1265		Low (13 days overdue)
LAST NAME	First Name	ACXXXXXX2			Short-Term Restorative Care, 27636		High (69 days overdue)
LAST NAME	First Name	ACXXXXXX3			Domestic assistance, 25236: General house cleaning		Low (69 days overdue)

3. The expanded view provides additional information, including:

- the NAPS Service ID the referral was sent to
- any comments added by the assessor or My Aged Care Contact Centre
- whether the client has additional referrals for other service types with your outlet.

You can use the information on the referral card to decide whether to **accept**, **reject**, or **waitlist** the referral.

If you need more information before making a decision, select **View Referral Summary and Client Record**. This page shows:

- referral details
- the client's assessment information
- assessment outcomes
- additional client information relevant to service delivery.

First Name LAST NAME

Aged 114 (DD Month YYYY), Male

Suburb, State, 1111

About this referral

Outlet

Example Outlet - Support At Home

Date referred

DD Month YYYY

Date due

DD Month YYYY

Referral comments

No referral comments provided

About this service

Referred for

Support at Home

Service item name

Allied health and therapy

Naps service Id

1234

Home support Short-term - SaH Restorative Care Pathway

Funding assigned

VIEW REFERRAL SUMMARY AND CLIENT RECORD

ACCEPT REFERRAL

ACCEPT TO WAITLIST

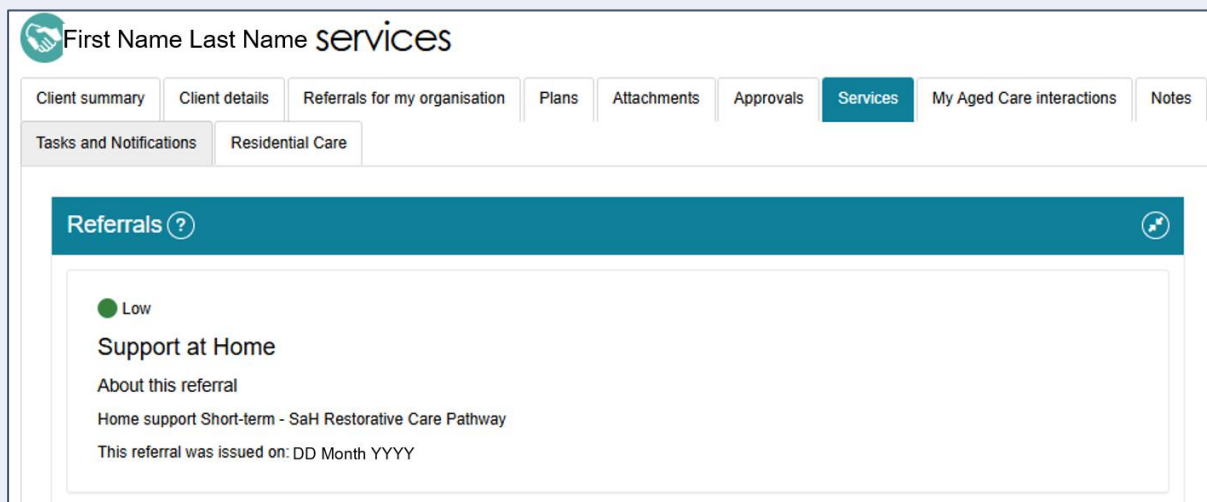
REJECT REFERRAL



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

8

You can also view referrals on the **Services** tab.



The screenshot shows the 'Services' tab in the My Aged Care system. At the top, there's a header with 'First Name Last Name' and 'services'. Below this is a navigation bar with tabs: 'Client summary', 'Client details', 'Referrals for my organisation', 'Plans', 'Attachments', 'Approvals', 'Services' (highlighted), 'My Aged Care interactions', and 'Notes'. Under 'Services', there are sub-tabs: 'Tasks and Notifications' and 'Residential Care'. The main content area is titled 'Referrals' with a question mark icon. It shows a referral for 'Support at Home' with a 'Low' priority indicator. Below the title, it says 'About this referral' and provides details: 'Home support Short-term - SaH Restorative Care Pathway' and 'This referral was issued on: DD Month YYYY'.

5. Before you accept a referral, review the referral and client information and confirm that you can provide services to the client.

You can find this information in the **Client Details** tab, including:

- Primary contact person
- Identity information and the status of the identity check
- Communication requirements
- Address and contact details (suburb, state or territory, and postcode only). The full address becomes available after you accept the referral.
- Payment details
- Health insurance details
- Service information
- Current notes
- The **Notify My Aged Care of Death** button.

You can view additional client information on the following tabs:

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

The image below shows the **Client Details** page. From this page, you can select other tabs to view additional information about the client.

First Name Last Name

Male, 114 years old, DD Month Year, ACXXXXXXXX1
1 Test Street, Example Suburb, ACT, 1111

Primary contact: First Name Last Name

No support relationships recorded



Client details



The client has not yet completed a wallet check.
Conduct a wallet check now
Please remind Client Name to verify their mobile phone number when you see them next.

Client summary

Client details

Referrals for my organisation

Plans

Attachments

Approvals

Services

My Aged Care interactions

Notes

Tasks and Notifications

Residential Care

About First Name

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

Personal information

Born DD Month Year born in Australia, divorced, lives alone
Status: Active
Preference for a First Nations Assessment Organisation to do their assessment: No

Primary Contact

This is who My Aged Care will contact first

First Name LAST NAME

Communication requirements

- Prefer to speak English

Address details

Home address
SUBURB STATE XXXX

Identity documents (ID)

Aged Care ID: ACXXXXXX

Aged Care Management Payment System (ACMPS) number: 04XXXXXX

Identity Status

IHI Record status: Not Attempted
Identity match status: Not Attempted
Wallet check status: Not Attempted
Client association status: Not Associated

Payment details

Receiving payments
No payments found

Health insurance

6. To accept the referral, refer to [Accepting a Referral](#).

To reject the referral, refer to [Rejecting a Referral](#).

To accept the referral to waitlist, refer to [Accepting a Referral to Waitlist](#).

For more information about navigating the client record and viewing client information, refer to the [My Aged Care Service and Support Portal user guide – The client record](#).

- ! Before you accept a referral, review the referral and client information and confirm that you can provide the required services.
- ! Only accept a referral after your organisation has confirmed that it has the capacity to deliver the services the client needs. You should also confirm that the client agrees to proceed before accepting the referral.
- ! You can view the client's contact details and full address only after you have accepted the referral.



Accepting a referral

1. To accept the referral, select **ACCEPT REFERRAL** from the **Referral summary** page or from the expanded card or list view in incoming referrals tab.

Accepting Referral from Referral Summary

 **Referral summary for First Name Last Name**

Client summary

Client details

Referrals for my organisation

Plans

Attachments

Approvals

Services

My Aged Care interactions

Notes

Tasks and Notifications

Residential Care

Referrals for my organisation

ACCEPT REFERRAL

ACCEPT TO WAITLIST

REJECT REFERRAL

SEE SERVICE DETAILS

Support at Home

About this referral
Issued Date DD Month YYYY
Due Date DD Month YYYY

About this service
Home support Short-term - SaH Restorative Care Pathway

▼ Priority Low

Accepting Referral from Incoming Referrals Tab (Card View)

First Name LAST NAME 

Aged 114 (DD Month YYYY), Male

 SUBURB, STATE, 1111

About this referral
Outlet Example Outlet - Support At Home
Date referred DD Month YYYY
Date due DD Month YYYY
Referral comments No referral comments provided

About this service
Referred for Support at Home
Service item name Allied health and therapy
Naps service Id 1234

 Home support Short-term - SaH Restorative Care Pathway

 Funding assigned

VIEW REFERRAL SUMMARY AND CLIENT RECORD

ACCEPT REFERRAL

ACCEPT TO WAITLIST

REJECT REFERRAL

Accepting Referral from Incoming Referrals Tab (List View)

Incoming referrals

[Incoming referrals](#)
[Waitlist](#)
[Accepted services pending](#)
[Services in place](#)
[Referral history](#)

CARD

LIST

Filter by

1 to 50 out of 335 matching results

Last name	First name	Aged care user ID	Due date	Referred date	Referred for	Recommended start date	Priority
LAST NAME	First Name	ACXXXXX1	DD Month YYYY	DD Month YYYY	Support at Home		Low (13 days overdue)

Aged 114 (DD Month YYYY), Male

About this referral

Outlet: Example Outlet - Support At Home

Date referred: DD Month YYYY

Date due: DD Month YYYY

Referral comments: No referral comments provided

SUBURB, STATE, 1111

About this service

Referred for: Support at Home

Service item name: Allied health and therapy

Naps service Id: XXXX

Home support Short-term - SaH Restorative Care Pathway

Funding assigned

[VIEW REFERRAL SUMMARY AND CLIENT RECORD](#)

ACCEPT REFERRAL

ACCEPT TO WAITLIST

REJECT REFERRAL

- If your organisation has more than one service or NAPS Service ID for the service type, select the correct **service item** or **NAPS Service ID** to link to the referral.

To confirm your decision, select **Accept**.

Accept this referral for First Name LAST NAME

Accept this referral for Client Name: (Referral ID#1111111111)

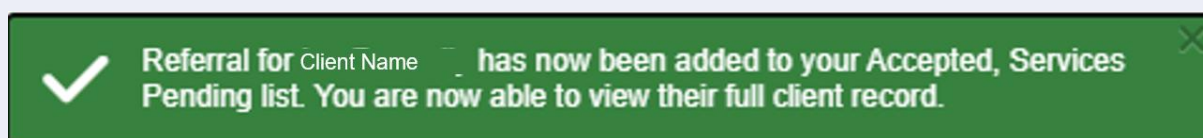
Select service item ?

Referred for	NAPS ID	Service Name
☒ Support at Home	1111	Example Service 1
☐ Support at Home	2222	Example Service 2
☐ Support at Home	3333	Example Service 3

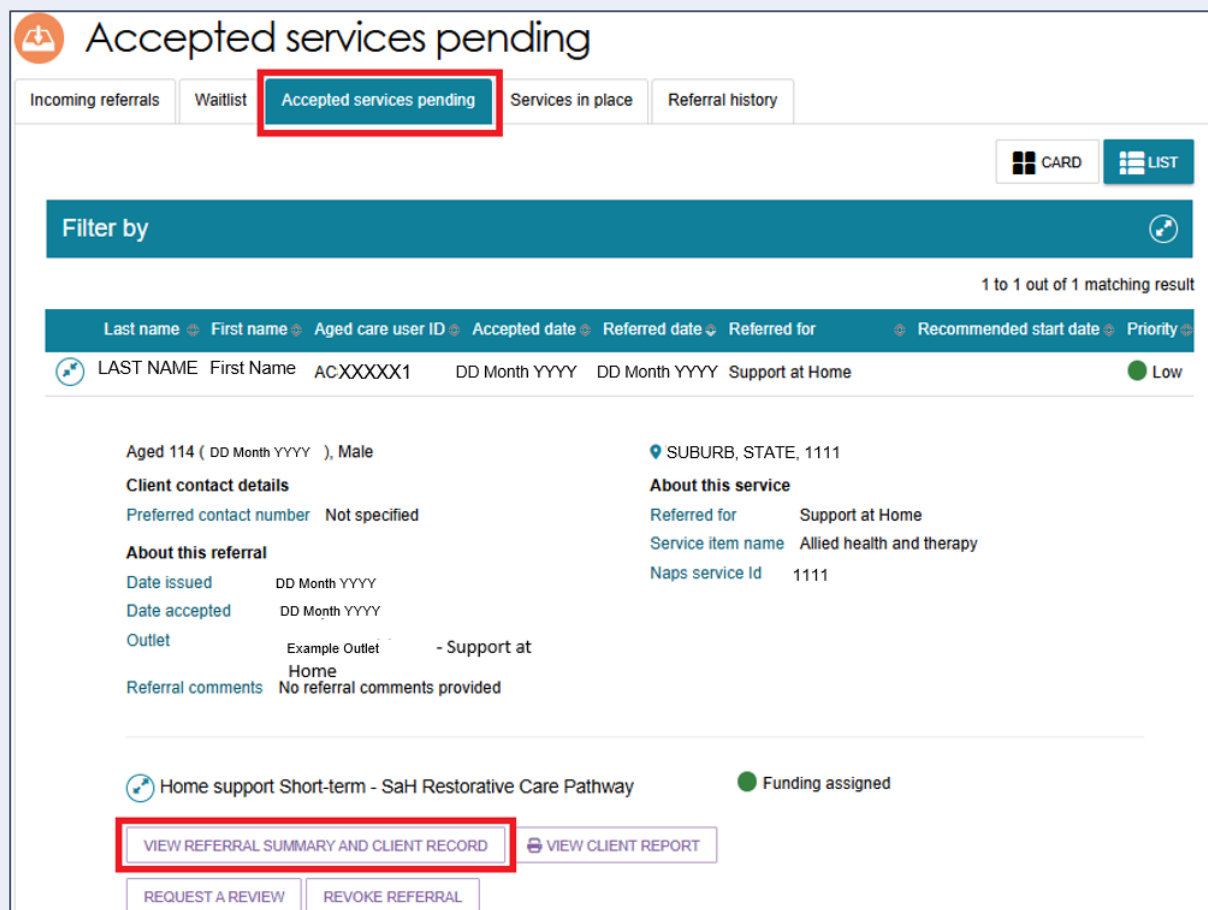
ACCEPT

CANCEL

3. A confirmation message will appear at the bottom of the screen to confirm that you have accepted the referral.



4. After you accept the referral, you can access the client's full record, including complete address and contact details, from the **Accepted Services Pending** tab.

The screenshot shows a web interface titled "Accepted services pending". At the top, there are tabs: "Incoming referrals", "Waitlist", "Accepted services pending" (which is highlighted with a red box), "Services in place", and "Referral history". To the right of these tabs are "CARD" and "LIST" buttons. Below the tabs is a "Filter by" search bar. A table header shows columns: "Last name", "First name", "Aged care user ID", "Accepted date", "Referred date", "Referred for", "Recommended start date", and "Priority". A single row of data is visible: "LAST NAME", "First Name", "ACXXXXX1", "DD Month YYYY", "DD Month YYYY", "Support at Home", and "Low". Below the table, there are sections for "Client contact details", "About this referral", and "About this service". At the bottom, there are two buttons: "VIEW REFERRAL SUMMARY AND CLIENT RECORD" (highlighted with a red box) and "VIEW CLIENT REPORT". There are also "REQUEST A REVIEW" and "REVOKE REFERRAL" buttons at the very bottom.

- ! After you accept a referral, you must provide service delivery information within the required timeframe for the referral's priority level.

For more information about these requirements, visit the [My Aged Care - Service and Support Portal resources](#) page on the department's Website.

Rejecting a referral

1. To reject a referral, select **Reject Referral** from the referral card or the **Referral Summary** page.

Rejecting Referral from the Referral Summary Page

 Referral summary for First Name Last Name

Client summary

Client details

Referrals for my organisation

Plans

Attachments

Approvals

Services

My Aged Care interactions

Notes

Tasks and Notifications

Residential Care

Referrals for my organisation

ACCEPT REFERRAL

ACCEPT TO WAITLIST

REJECT REFERRAL

Allied health and therapy: Physiotherapy

About this referral

Issued Date

DD Month YYYY

Due Date

DD Month YYYY

—

Priority Medium

Rejecting Referral from Incoming Referrals Tab (Card View)

First Name LAST NAME

Aged 85 (DD Month YYYY), Male

About this referral

Outlet

Example Outlet

Date referred

DD Month YYYY

Date due

DD Month YYYY

Referral comments

No referral comments provided

About this service

Referred for

Allied health and therapy

Service sub type

Physiotherapy

Service item name

Support At Home

Naps service Id

1111

VIEW REFERRAL SUMMARY AND CLIENT RECORD

ACCEPT REFERRAL

ACCEPT TO WAITLIST

REJECT REFERRAL

Rejecting Referral from Incoming Referrals Tab (List View)

The screenshot shows the 'Incoming referrals' interface. At the top, there are tabs for 'Incoming referrals', 'Waitlist', 'Accepted services pending', 'Services in place', and 'Referral history'. Below the tabs are view options for 'CARD' and 'LIST'. A 'Filter by' bar is present, and a message indicates '1 to 1 out of 1 matching result'. A table lists referrals with columns: Last name, First name, Aged care user ID, Due date, Referred date, Referred for, Recommended start date, and Priority. The first row shows a referral for 'LAST NAME' with a priority of 'Medium (74 days overdue)'. Below the table, a detailed view of the referral is shown, including 'About this referral' and 'About this service' sections. At the bottom, there are three buttons: 'ACCEPT REFERRAL', 'ACCEPT TO WAITLIST', and 'REJECT REFERRAL' (which is highlighted with a red box).

Last name	First name	Aged care user ID	Due date	Referred date	Referred for	Recommended start date	Priority
LAST NAME	First Name	ACXXXXXXX1	DD Month YYYY	DD Month YYYY	Allied health and therapy, Physiotherapy		Medium (74 days overdue)

About this referral

Outlet: Example Outlet

Date referred: DD Month YYYY

Date due: DD Month YYYY

Referral comments: No referral comments provided

About this service

Referred for: Allied health and therapy

Service sub type: Physiotherapy

Service item name: Support at Home

Naps service Id: XXXX

[VIEW REFERRAL SUMMARY AND CLIENT RECORD](#)

[ACCEPT REFERRAL](#) [ACCEPT TO WAITLIST](#) [REJECT REFERRAL](#)

2. Select a reason for rejecting the referral from the drop-down list.

You can also add more information in the **Rejection Reason** field if needed.

If the client passed away during the assessment period, select **Client Deceased** from the drop-down list.

The screenshot shows a 'Reject referral' dialog box for 'First Name Last Name'. It includes a message: 'All fields marked with an asterisk (*) are required. You are about to reject the referral for Roger Newman (Referral ID#xxxxxxxxxx).'. Below this, there is a 'Reason for rejecting' section with a 'Select one' dropdown menu. The dropdown menu is open, showing a list of reasons for rejection: 'Client in respite/hospital', 'Client ineligible', 'Client uncontactable', 'Outside service region', 'Referral made in error', 'Insufficient capacity', 'No one accredited', 'Conflict of interest', 'Other', 'Further info to be added', 'Service no longer required', 'Client deceased', and 'Unable to process referral'.

Reject referral for First Name Last Name

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

You are about to reject the referral for Roger Newman (Referral ID#xxxxxxxxxx).

Reason for rejecting *

Select one

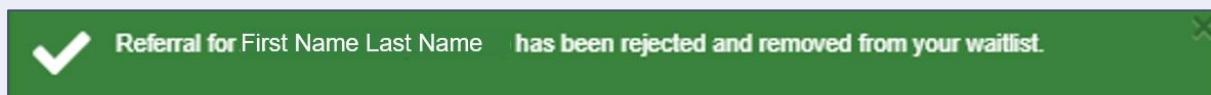
Select one

- Client in respite/hospital
- Client ineligible
- Client uncontactable
- Outside service region
- Referral made in error
- Insufficient capacity
- No one accredited
- Conflict of interest
- Other
- Further info to be added
- Service no longer required
- Client deceased
- Unable to process referral

3. The system shares your rejection comments with assessors through the Assessor Portal, but clients cannot see these comments in their Online Account.

Providing a reason for rejection helps assessors and the My Aged Care Contact Centre support clients to find appropriate services.

After you reject the referral, a confirmation message appears at the bottom of the screen.



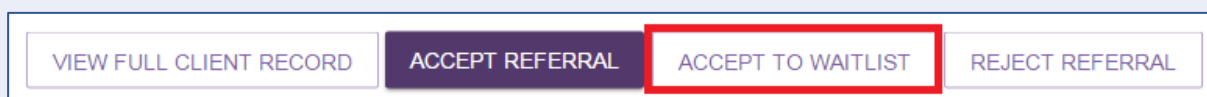
- ! If your outlet cannot provide the service because of limited capacity, ask your Administrator to update your service availability and information in the portal.

For more information, refer to the *Adding service items* section of the [Service and Support Portal user guide Part 1 – Administrator functions](#).

4. If you cannot provide the service immediately and your outlet has a waitlist, you can [add the referral to the waitlist](#) instead of rejecting it.

The referral will appear in your outlet's **Waitlist** tab.

This option is only available if your Administrator has set up the service to use a waitlist. For more information, refer to the [Service and Support Portal User Guide Part 1 – Administrator Functions](#).



Rejecting a referral – client deceased

- ! If you reject a referral and select **Client Deceased** as the reason, the system changes the client's status to **Deceased** and makes the client record read-only.

The system will then:

- Recall any referrals that have not been accepted.
- End any services currently in place.
- Cancel any scheduled or ongoing assessments.
- Remove the client's access to the client portal.

After the client's status changes to Deceased, My Aged Care will stop sending correspondence to the client and their supporters.

If the client is active in the Support at Home Priority System or has been assigned Support at Home funding, the system will remove the client from the priority system and withdraw the assigned funding.

[After you select Client Deceased as the rejection reason](#), the system will take you to the **Reject Referral** screen.

Enter the following information:

- How, when, and by whom you were told that the client has died.
For example: "Mrs Smith called to advise that Mr Smith passed away on Saturday."
- The client's **date of death**, if known.
- Any supporting documents, such as:

- a death certificate
- hospital discharge documents
- other relevant evidence
- Any additional information in the **Rejection Reason** field (optional).

! The provider can add notes and attachments to the client record for 14 days after ceasing services for their client.

Revoking an accepted referral

Sometimes, circumstances change after you accept a referral and you can no longer provide services to the client. For example, the client may withdraw their consent or their situation may change.

You can only revoke an accepted referral if:

- You have not entered any service delivery information, and/or
- Services have not started.

The Department monitors how providers use this feature.

If your outlet revokes **20% or more** of the referrals issued to it over a 12-month period, the Department will send a notification to your organisation.

Follow these steps to revoke a referral after you have accepted it:

1. Go to the **Accepted Services Pending** tab in the **Service Referrals** section of the Portal.

Find the referral you want to revoke, you can:

- Use the **Filter** options to narrow your search.
- Sort the results and select **Go** to update the list.
- Switch between **Card View** and **List View**.

Accepted services pending

Incoming referrals Waitlist **Accepted services pending** Services in place Referral history

CARD LIST

Filter by

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

Current sort order is Accepted Date

1 to 4 out of 4 matching results

First Name LAST NAME

SUBURB, STATE, XXXX
Aged care user ID: ACXXXXXXXXX1
Date accepted: DD Month Year
Date referred: DD Month Year
Outlet: Example Outlet
Service type: Meals,
Medium

First Name LAST NAME

SUBURB, STATE, XXXX
Aged care user ID: ACXXXXXXXXX1
Date accepted: DD Month Year
Date referred: DD Month Year
Outlet: Example Outlet
Service type: Domestic Assistance,
Low

First Name LAST NAME

SUBURB, STATE, XXXX
Aged care user ID: ACXXXXXXXXX1
Date accepted: DD Month Year
Date referred: DD Month Year
Outlet: Example Outlet
Service type: Allied Health and Therapy Services, Dietitian or Nutritionist,
Medium

2. Open the referral by selecting the Expand icon (double arrows) in card or list view.

Then select **Revoke Referral**.

CARD VIEW

First Name LAST NAME

Aged 114 (DD Month YYYY), Male

Client contact details

Preferred contact number Not specified

About this referral

Date issued DD Month YYYY

Date accepted DD Month YYYY

Outlet Example Outlet

Referral comments No referral comments provided

Home support Short-term - SaH Restorative Care Pathway

Funding assigned

VIEW REFERRAL SUMMARY AND CLIENT RECORD

VIEW CLIENT REPORT

REQUEST A REVIEW

REVOKE REFERRAL

LIST VIEW

Last name	First name	Aged care user ID	Accepted date	Referred date	Referred for	Recommended start date	Priority
LAST NAME	First Name	ACXXXXX XXX1	DD Month YYYY	DD Month YYYY	Support at Home		Low

Aged 114 (DD Month YYYY), Male

Client contact details

Preferred contact number Not specified

About this referral

Date issued DD Month YYYY

Date accepted DD Month YYYY

Outlet Example Outlet

Referral comments No referral comments provided

About this service

Referred for Support at Home

Service item name Allied health and therapy

Naps service Id XXXX

Home support Short-term - SaH Restorative Care Pathway

Funding assigned

VIEW REFERRAL SUMMARY AND CLIENT RECORD

VIEW CLIENT REPORT

REQUEST A REVIEW

REVOKE REFERRAL

- Select a **revocation reason** from the drop-down list.

In the **Comments** field, explain why you are revoking the referral after accepting it.

Select **Revoke Referral** to confirm your decision.

Revoke Client Name referral

Warning: You should only accept a referral for service where you intend to provide services to a client. If the circumstances have changed and you're no longer able to provide services to a client, then you can revoke the accepted referral once you've provided a reason.

Please note that the department monitors revoked referrals as they have a direct impact on the timely delivery of aged care services to clients.

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

Please select a reason for revocation after acceptance (*)

Reason for revocation after acceptance *

Select one

Select one

Client withdrew

Unable to deliver service

Client deceased

Other

REVOKE REFERRAL

CANCEL

- The system will display a confirmation message to show that the referral has been revoked. The referral will no longer appear in the **Accepted Services Pending** tab.

Referral for First Name Last Name **been revoked and removed from your accepted services pending list.**

! If you revoke a referral after acceptance, the system may automatically issue other available referrals for the client, such as broadcast or preference referrals.

Revoking a referral - client deceased

If you revoke a referral and select **Client Deceased** as the reason, the system changes the client's status to **Deceased** and makes the client record read-only.

The system will then:

- Recall any referrals that have not been accepted.
- End any services currently in place.
- Cancel any scheduled or ongoing assessments.

Remove the client's access to the **My Aged Care Online Account**.

After the client's status changes to **Deceased**, My Aged Care will stop sending correspondence to the client and their support network.

If the client is active in the **Support at Home Priority System** or has been assigned a **Support at Home service**, the system will remove the client from the priority system and withdraw any assigned Support at Home services.

When you select **Client Deceased**, enter the following information:

- How, when, and by whom you were told that the client has died. For example: *"Mrs Smith called to advise that Mr Smith passed away on Saturday."*
- The client's **date of death**, if known.
- Any supporting documents, such as:
 - a death certificate
 - hospital discharge documents
 - other relevant evidence.

Revoke Client Name referral

Warning: You should only accept a referral for service where you intend to provide services to a client. If the circumstances have changed and you're no longer able to provide services to a client, then you can revoke the accepted referral once you've provided a reason.

Please note that the department monitors revoked referrals as they have a direct impact on the timely delivery of aged care services to clients.

All fields marked with an asterisk (*) are required.
Please select a reason for revocation after acceptance (*)

Reason for revocation after acceptance *

Client deceased

You are about to notify the department that Client Name 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...

Comments:

REVOKE REFERRAL CANCEL

Accepting a Referral to Waitlist

If your organisation enables the **waitlist** function in the portal, you can accept electronic referrals onto a waitlist. This allows clients to join a waitlist for a service until a place becomes available.

Before you can accept referrals to a waitlist, your organisation's **Administrator** must turn on **Waitlist Availability** for the relevant services. For instructions, refer to [My Aged Care – Service and Support Portal user guide – Creating service delivery outlets and adding service information](#).

Follow these steps to accept a referral to a waitlist:

1. Go to **Service Referrals** and open the **Incoming Referrals** tab.
2. In either **Card View** or **List View**, expand the client's referral to view more details, then select **ACCEPT TO WAITLIST**.

VIEW REFERRAL SUMMARY AND CLIENT RECORD

ACCEPT REFERRAL ACCEPT TO WAITLIST REJECT REFERRAL

3. Select **ACCEPT** to confirm your choice.

Accept referral to waitlist

Accept this waitlist for Client Name (Referral ID#XXXXXXX I)

ACCEPT CANCEL

4. The system will display a confirmation message to show that the referral has been added to the waitlist. The referral will then appear in the **Waitlist** tab on the **Service Referrals** page.

The screenshot shows a green confirmation banner at the top: "Referral for Client Name has now been added to your Waitlist." Below this is the "Waitlist" tab, which is highlighted with a red box. The interface includes a "Filter by" bar, a "Sort Referrals by" dropdown set to "Date Waitlisted", and an "in order of" dropdown set to "Latest to Earliest". A "GO" button is next to the sort options. Below the sort options, it says "Current sort order is Date Waitlisted" and "1 to 20 out of 28 matching results". The main area displays three referral cards. The first card is highlighted with a red box and contains the following information: "First Name LAST NAME", "Aged care user ID: ACXXXXXXXXX1", "Accepted Date: DD Month Year", "Date referred: DD Month Year", "Outlet: Example Outlet", "Referred for: Allied health and therapy, Physiotherapy", and a "To start: None" button with a "Medium" button next to it. The second and third cards follow a similar format with different details.

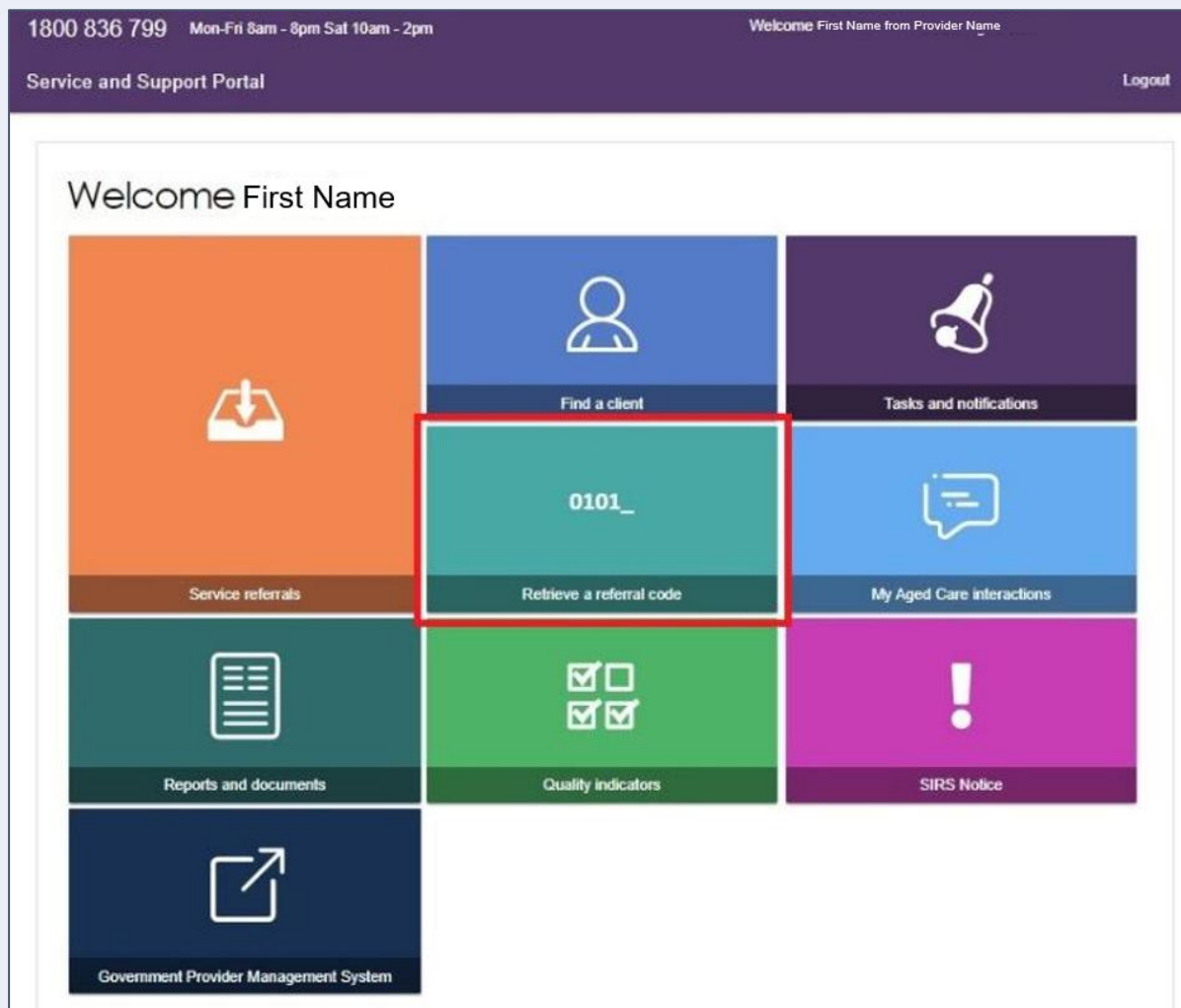
Retrieving a Referral Code

Clients can choose to receive a **referral code** from an assessor or the My Aged Care Contact Centre.

A referral code lets clients talk to different service providers about their needs before choosing their preferred provider.

If a Team Leader receives a referral code from a client, follow these steps to retrieve the referral:

1. From the homepage select **Retrieve a referral code**.



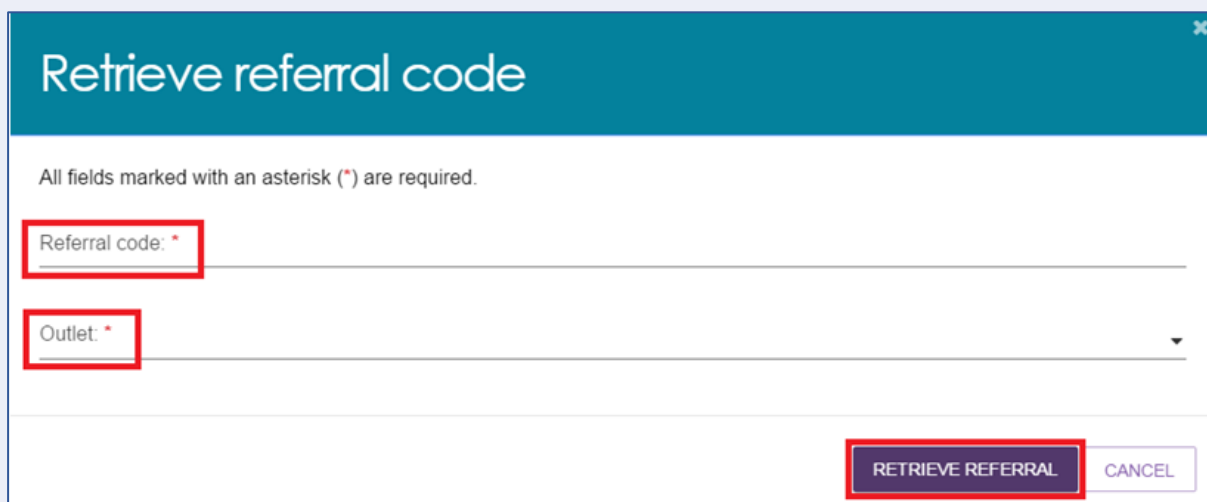
You can also select **Retrieve a Referral Code** from the toolbar at the top of any page in the portal.



2. Enter the client's referral code.

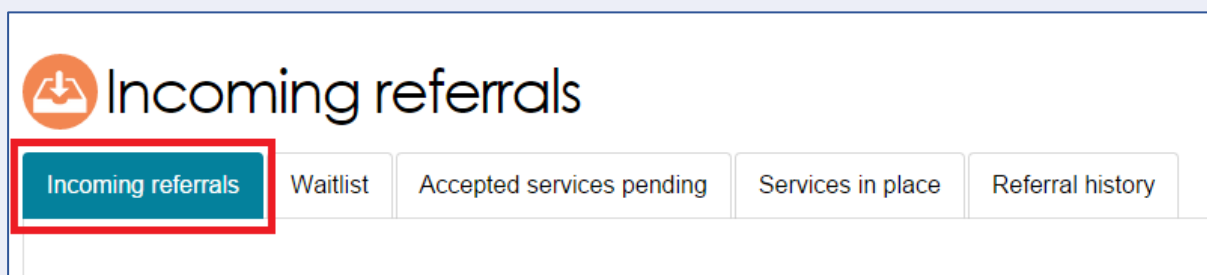
Select the outlet that will provide the services, then select **Retrieve Referral**.

If you are an organisation Team Leader, you can choose the outlet that will receive the referral. Outlet Team Leaders do not have this option.



3. The system will display a confirmation message to show that it has successfully retrieved the referral.

The referral will then appear in the **Incoming Referrals** tab under **Service Referrals**.



The system will take you to the **Incoming Referrals** page, where you can review the referral details.

Depending on the client's preferences and your organisation's capacity, you can:

- [accept or reject the referral for service\(s\);](#)
- [accept the referral to waitlist;](#) or
- [revoke the referral after acceptance.](#)

! Before you accept a referral, review the referral and client information and confirm that your organisation can provide the required services. Only accept the referral when both your organisation and the client agree to start services.

! Before you accept a referral, review the referral and client information and confirm that your organisation can provide the required services. Only accept the referral when both your organisation and the client agree to start services.

Clients and their supporters can manage referral codes through their **My Aged Care Online Account**.

! **Home Support services**

If you provide Support at Home services and a client wants to change providers, the client can reactivate their referral code through their **My Aged Care Online Account**.

For more information, direct the client to the [Access your information online](#) website or call the My Aged Care Contact Centre on 1800 200 422.

For Support at Home services, clients usually receive a referral only after funding has been assigned. In most cases, My Aged Care provides the client with a referral code to share with their chosen provider.

After receiving a referral, providers should check the **take-up deadline**. You must start services before this date. If you do not start services by the deadline, My Aged Care may withdraw the assigned Support at Home services.

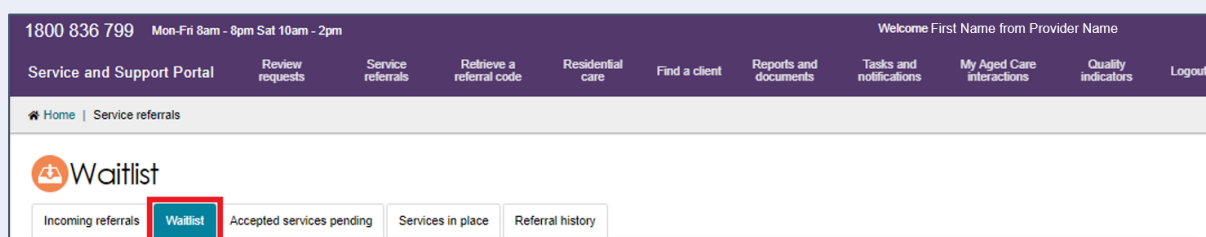
Drawing a Client into Service from a Waitlist

When a place becomes available, you can move a client ('drawing a client') from the waitlist into service and start delivering services.

A client can join waitlists with multiple providers at the same time. Once a provider starts the client on a service ('drawn down into service'), the system automatically removes the client from all other waitlists for the same service type.

1. Go to the **Waitlist** tab in the **Service Referrals** section of the Service and Support Portal.

This tab shows all referrals that have been accepted onto a waitlist.



2. Find the client's referral and expand the record in either **Card View** or **List View**.

You can:

- Use the **Filter** options to narrow your search.
- Sort the results and select **Go** to update the list.
- Switch between **Card View** and **List View**.

! Before moving the client into service, review the **Referral Summary** and **Client Record** to confirm that you can still provide the service.

Then, select **Draw down into service**.

First Name LAST NAME

Aged 83 (DD Month YYYY), Female
ISUBURB, STATE, 1111

Client contact details
Preferred contact number Not specified

About this referral
Date issued DD Month YYYY
Date accepted DD Month YYYY
Outlet Example Outlet
Referral comments No referral comments provided

About this service
Service type Residential Permanent
Service sub type No sub types
Service item name Example Service Name
Naps service Id 1111

VIEW REFERRAL SUMMARY AND CLIENT RECORD
VIEW CLIENT REPORT
DRAW DOWN INTO SERVICE
REJECT REFERRAL

- If your organisation has more than one service item or NAPS Service ID for the service type, select the correct **service item** or **NAPS Service ID**.

Select **Accept** to confirm the referral.

Draw down into service for First Name Last Name

Draw down into service for Client Name (Referral ID#2XXXXXXX)

Select service item ?

Service Type	NAPS ID	Service Name
☒ Residential Permanent	XXXX	Example Service

ACCEPT
CANCEL

The system will display a confirmation message to confirm that you have accepted the referral.

The referral will move to the **Accepted Services Pending** tab until you record the service delivery information.

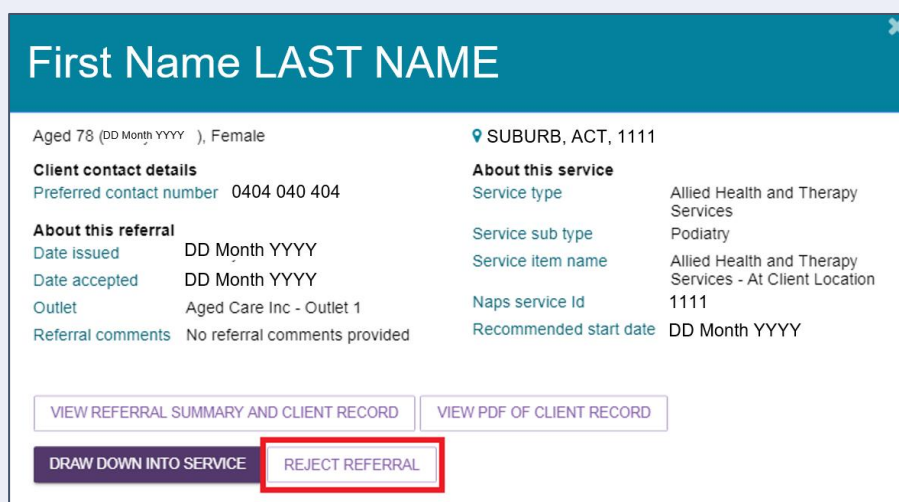
Accepted services pending

Incoming referrals
Waitlist
Accepted services pending
Services in place
Referral history

If you cannot provide the service, you can reject the referral.

1. Select **Reject Referral**.
2. Choose a **rejection reason**.
3. Select **Reject**.

Providing a rejection reason helps assessors and the My Aged Care Contact Centre support clients to access services.



First Name LAST NAME

Aged 78 (DD Month YYYY), Female SUBURB, ACT, 1111

Client contact details	About this service
Preferred contact number 0404 040 404	Service type Allied Health and Therapy Services
About this referral	Service sub type Podiatry
Date issued DD Month YYYY	Service item name Allied Health and Therapy Services - At Client Location
Date accepted DD Month YYYY	Naps service Id 1111
Outlet Aged Care Inc - Outlet 1	Recommended start date DD Month YYYY
Referral comments No referral comments provided	

[VIEW REFERRAL SUMMARY AND CLIENT RECORD](#) [VIEW PDF OF CLIENT RECORD](#)

[DRAW DOWN INTO SERVICE](#) [REJECT REFERRAL](#)

After you reject the referral, the system removes it from your waitlist and it will no longer appear in the Service and Support Portal.

Notifications for Overdue Referrals

Team Leaders can see visual alerts in the **Incoming Referrals** tab when referrals have not been actioned within the required priority timeframes.

A referral is considered actioned when you:

- Accept the referral
- Reject the referral, or
- Add the referral to a waitlist.

Incoming referrals

First Name
LAST NAME

SUBURB, STATE, XXXX
 Aged Care ID: ACXXXXXXXXX1
 Date referred: DD Month Year
 Due date: DD Month Year
 Outlet: Example Outlet
 Service type: Domestic Assistance, 8693: General House Cleaning

Medium (85 days overdue)

First Name
LAST NAME

SUBURB, STATE, XXXX
 Aged Care ID: ACXXXXXXXXX1
 Date referred: DD Month Year
 Due date: DD Month Year
 Outlet: Example Outlet
 Service type: Flexible Respite, 8693: Other planned respite

Medium (179 days overdue)

The system also sends an email notification to the email address linked to the outlet, reminding staff to action the referral.

In addition, the portal displays these alerts in the **Tasks and Notifications** section as **Overdue Referral Tasks**.

Tasks and notifications

Tasks

Notifications

Maximum HCP wait times

Filter by

Due Date	Category	Title/Description	Aged Care User ID	Client name	Activity Id
	Client Services	Overdue Referral A referral has not been actioned in the required priority timeframes. Please review the referral and action appropriately. Assigned to: LAST NAME, First Name Go to: Client Services	AC111111111	LAST NAME, First Name	1-XXXXXXXXXX

Referral History

The **Referral History** tab lets Team Leaders and Staff Members view a client's referral history, including whether a referral was **revoked** or **recalled**.

To see more details about a referral:

- In **List View**, select the arrow next to the referral.
- In **Card View**, select the arrow on the referral card.

The expanded view shows additional referral information.

Filter by

Sort Referrals by:

Date Referred

in order of

Latest to Earliest

GO

Current sort order is Date Referred

Recalled

First Name

LAST NAME

SUBURB, STATE, XXXX

Aged care user ID: ACXXXXXXXXX1

Date referred: DD Month Year

Date recalled: DD Month Year

Outlet: Example Outlet

Service type: Allied Health and Therapy Services, 1-12DMT35: Dietitian or Nutritionist

Recalled

Low

Revoked after acceptance

First Name

LAST NAME

SUBURB, STATE, XXXX

Aged care user ID: ACXXXXXXXXX1

Date referred: DD Month Year

Date accepted: DD Month Year

Date revoked after acceptance: DD Month Year

Outlet: Example Outlet

Service type: Domestic Assistance,

Revoked after acceptance

Low

For **Support at Home** services, the expanded view also shows all Support at Home classifications assigned to or approved for the client, along with the client's service history for each classification.

Referral Priority Status

Incoming service referrals have a **priority level** of **low**, **medium**, or **high**. My Aged Care assigns the priority level based on:

- The client's ability to manage daily activities.
- Any risks related to the client's care needs.
- Other concerns identified during screening or assessment.

Service providers must action referrals within **3 calendar days** of receiving an electronic referral or an electronic waitlist referral.

You can action a referral by:

- Accepting the referral.
- Rejecting the referral.
- Adding the referral to a waitlist.

! Support at Home program approvals will not display as a service priority.

More Information and Support

For more information, visit the [My Aged Care – Service and Support Portal resources](#) webpage.

If you need assistance, contact the My Aged Care Service Provider and Assessor Helpline on 1800 836 799.

