- Where the older person has nominated a primary contact, and the triage delegate is satisfied that the older person nominated this person to be contacted in place of the older person in all instances (or the primary contact has nominated themselves because they are an appointed decision maker recognised under the Act with relevant legal authority for the older person), the triage delegate can contact the nominated primary contact in the first instance. This may be to inform the primary contact that the delegate is seeking to conduct triage, what triage would involve, and to ask the primary contact to discuss the process with the older person. An older person is encouraged to be present for triage, but this is not necessary if the primary contact either:
    - can communicate information for the older person, including in their capacity as an agent or a registered supporter, or
    - is an active, appointed decision maker for the older person recognised under the Act and has legal authority to make decisions relevant to triage on behalf of the older person.
- If the triage delegate is contacting the older person's appointed decision maker, the triage delegate must ask them to confirm:
    - that they are acting in line with their legal authority to make decisions for the client (mandatory), and
    - if they have talked to the client about the triage and what it may involve (not mandatory, but this is in line with the principles of supported decision-making).

Note:

Registered supporters must act only within the scope of their roles. For example, the role of a registered supporter is to support the older person to make and communicate their own decisions, acting in line with the known will and preferences of the older person. Triage delegates should check that a registered supporter or agent is communicating information for the older person in line with their role, not making decisions on behalf of the older person. If in doubt, the triage delegate should contact the older person.

If an active, appointed decision maker recognised under the Act (whether or not registered as a supporter), is making a decision on behalf of an older person, triage delegates must be satisfied that the appointed decision maker is acting in line with their legal authority under a Commonwealth, state or territory arrangement, and that the authority is relevant in the circumstances.

Triage Delegates should review the proof an appointed decision maker has provided to the System Governor to support their authority. A Triage Delegate cannot rely solely on a person's registration as a supporter to assume their decision-making authority for aged care triage or assessment matters or assume that simply because a person has a supporter guardian, the older person does not have decision-making capacity for some or for all matters.

Triage Delegates should also inform the appointed decision maker that it is preferred, where possible, that the older person is present on the call.

If any information or documents must be shared with an older person during the triage process, it must also be shared with certain registered supporters (supporters and supporter guardians) for an older person, in line with the Act (section 29). Information cannot be automatically shared with an older person's 'supporter lite.'

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Triage delegates must consider a referral to care finder services for a vulnerable older person who does not have anybody who can support them. Information on care finder services is available at My Aged Care. For Aboriginal and Torres Strait Islander clients, the assessor may also connect the older person with an Elder Care Support worker to provide additional support to the older person.

From 29 June 2026, a new pathway in the My Aged Care Assessor Portal will allow a Triage Delegate to determine that a client is not eligible for assessment without completing the triage process. Where a client is clearly ineligible (for example, due to age), the Triage Delegate can use the 'Decide Not Eligible' function in the My Aged Care Assessor Portal to record the decision without completing the triage section of the Assessor Portal. They must select the reason the client does not meet the eligibility criteria and will then be directed to the attachments tab to generate and upload the ineligibility letter. Clients found ineligible at triage must be issued an 'Ineligible for Assessment' letter, which must be uploaded to the client's online record.

- Help from a care finder | My Aged Care
- Elder Care Support program | My Aged Care

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5.3.1. Initial discussion

When contacting the older person and/or nominated contact, triage delegates should:

- Identify who they are and the organisation they are from and confirm that they have 15 to 20 minutes to discuss their assessment request.
- Complete an identity check and confirm whether there is anyone else with the older person at the time (e.g., registered supporters, family members). If they do not have anyone with them and would like someone with them, call back at a more suitable time.
- Advise they have received the referral, who it is from and the role the assessment organisation plays.
- Advise they will be asking a few questions relating to their general health and wellbeing to help inform assessment needs.
- Confirm consent (consistent with section 5.1) and ensure the older person understands why they are having the assessment, why the assessor needs to come to their home (if applicable) and allay any concerns or fears that they may have about the assessment. Should the older person or their active, appointed decision maker recognised under the Act choose not to give consent, the triage process is to end, and the assessment referral is rejected.
- Confirm their preference for an Aboriginal and Torres Strait Islander assessment organisation (see below this section for further detail).
- Check the contact information for the older person, and if appropriate, the contact information for the registered supporter or agent, such as a care finder (including address for receiving correspondence) to ensure it is complete, correct and validated.
- Gather any additional information required, including whether the older person would like someone who supports them/registered supporter/agent present for the triage questions asked using the Integrated Assessment Tool or at the assessment.
    - If an older person lacks decision-making capacity, an active, appointed decision maker recognised under the Act (whether or not a registered

supporter) must be involved in the assessment to ensure the older person is accurately assessed. An active, appointed decision maker for this purpose may already be identified on the older person's record as a person to whom all correspondence must be sent. Triage delegates should review the proof an appointed decision maker has provided to the System Governor to support their authority. Registered supporters who are not active, appointed decision makers can also be involved, in line with the will and preferences of the older person. The assessor can submit a request to create a new registered supporter/agent relationship if required (see Chapter 3).
    - Submitting a 'request' may mean a supporter relationship is recorded in the system as a pending relationship seeking to be registered by the System Governor. There are many ways to submit a request, including with the help of an assessor, online, by calling My Aged Care, or using a printed registration form. More information on the registration pathways is available at: www.myagedcare.gov.au/registering-supporter.
    - A person who is seeking to become a registered supporter and wants to rely on their authority as an active, appointed decision maker to become registered, must provide proof to show they are an active, appointed decision maker for the older person. This is likely to be legal documentation. Medical evidence may also be required to establish that the older person is experiencing a loss of decision-making capacity.
- Organise an interpreter if required (e.g., for interpreting services or Auslan) and ensure other necessary supports are in place for the assessment.

- Acknowledge that multiple contacts with older Aboriginal and Torres Strait Islander people may be required to build trust and rapport but this should not compromise on older people being able to access timely aged care services.

Note: An interpreter may need to be pre-booked, so early action on interpreter arrangements will assist meeting timeliness measures.

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- There are several support networks that the triage delegate can refer to for older people who are more vulnerable or hesitant to participate. These include:
    - Home - OPAN
    - Support for older culturally and linguistically diverse people | My Aged Care
    - Getting support in aged care | My Aged Care
    - Help from a care finder | My Aged Care
    - Elder Care Support | Australian Government Department of Health, Disability and Ageing
    - Support for people who are lesbian, gay, bisexual, transgender or intersex or other sexual orientations or are gender diverse or bodily diverse | My Aged Care
- Consider asking the older person if they have a My Health Record to help ensure their Support Plan can be linked to it (subject to their consent, as per section 5.1).

Confirming a client's preference for an Aboriginal and Torres Strait Islander assessment organisation

A client's preference for an Aboriginal and Torres Strait Islander assessment organisation, will usually be captured at registration. The client's preference will be visible on their client card.

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It will need to be confirmed when completing the client's demographic details at triage.

- When a triage delegate receives a referral, they should view the client information to gain a preliminary understanding of the client's situation.
- If there is no preference listed, please record the preference after having a conversation with the older person.

  It is important to have a conversation with the older person about their preference. It should not be assumed that all Aboriginal and Torres Strait Islander people will want their assessment with an Aboriginal and Torres Strait Islander assessment organisation.
- The client's preference will determine whether the referral is accepted, transferred or rejected.
- If a transfer is required, this will need to be managed with the support of a Team Leader.
- It will also ensure that the assessment process is responsive to the person's individual situation.

Asking triage questions using the Integrated Assessment Tool

The triage component of the IAT helps validate the appropriateness of an assessment referral and to collect information to support the assessment process. Triage delegates must refer to the IAT User Guide to ensure competency in the use of the IAT and in the delivery of high-quality triage. Triage delegates are also required to complete mandatory online induction training and triage delegate training before undertaking the triage component of the IAT.

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See the IAT User Guide for further information.

Triage delegates will be able to choose whether information gathered at screening is pre-populated into the triage component of the IAT. Pre-populating information will help reduce the older person's need to repeat their story.

The triage component of the IAT comprises questions relating to the reason for their assessment, current access to services, function, general health and general wellbeing and safety.

When conducting triage with older Aboriginal and Torres Strait Islander clients, a triage delegate should exercise discretion and professional judgement on how information is solicited from clients during the triage process. This includes ensuring that information is collected in a culturally safe manner. including the appropriate use of the IAT. A yarning approach may be employed to collect the necessary information and with consent from the older person, support persons may be present during the Triage process.

Where possible, the triage delegate should liaise with the client's GP, service provider and support networks to help inform the triage process. The approach allows relevant information to be gathered in advance and confirmed during triage, reducing the need for the client to repeat their story multiple times.

Note:

For referrals for the End-of-Life Pathway, triage questions will be optional so there is flexibility to only ask questions that are appropriate to the individual.

When completing the Triage section of the IAT, the triage delegate must provide clear justification in the 'Outcome/advice for assessment notes' field to support the recommended assessment type. This justification should explain why the selected assessment type is appropriate.

At the conclusion of the triage component of the IAT, triage delegates will confirm eligibility for an assessment, the assessment type, assessment priority and whether urgent services and/or linking supports are required, in instances where these services were not provided at screening. In the case of End-of-Life Pathway referrals, if an End-of-Life Pathway Form has not already been submitted, the triage delegate should advise the older person of the steps required. More information on the End-of-Life Pathway Form is included under section 5.3.4.

If the Triage Delegate disagrees with the assessment type and/or priority recommendations made at the screening stage, the triage delegate will have the ability to change the recommendations.

After triage, the team leader may also transfer the older person to another assessment organisation if appropriate. The team leader should ensure the older person understands why they are being transferred, and that the receiving assessment organisation is aware that they will receive the referral.

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Note:

If the older person is deemed to be ineligible for a needs assessment, the triage delegate should communicate the decision and inform them how to request an assessment in the future (this can occur at a separate time to the initial phone call, if necessary).

Effective communication with the older person (and their active, appointed decision maker or registered supporter, where appropriate) on a decision to not recommend an assessment, and effective communication between assessors, assists with managing expectations and reducing complaints.

An ‘Ineligible for Assessment Letter’ will need to be sent to the older person (and registered supporters, as required under the Act) as notice of this decision.

Within the IAT, the triage delegate will be able to consider the type of assessor recommended for the older person’s assessment, having regard to:

- relevant cultural background or understanding
- who has the expertise to address the diverse needs of the older person, such as part trauma
- who is geographically closest to the older person, which helps to ensure the older person is assessed in the most efficient, effective and timely manner.