



Australian Government



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# How to action referrals created automatically from the health professional webform

## PURPOSE

A new health professional webform has been implemented, informed by consultation with the health sector. A large proportion of these referrals will be automatically processed without intervention by the My Aged Care contact centre.

This factsheet provides information on changes to the referral creation process as part of this automation and how this impacts Regional Assessment Services (RASs) and Aged Care Assessment Teams (ACATs).

## TIMING OF THE CHANGES

These changes will be implemented from 27 June 2016.

## THE INTENT OF THESE CHANGES

The changes made to the webform and referral creation are intended to:

- Improve client and referrer experience by reducing the time for inbound referral handling in the contact centre
- Achieve consistency in referral pathways
- Streamline the screening and assessment process by ensuring that accurate and more complete information is provided to assessors and service providers, reflective of information provided by the health professional when making the original referral
- Enable the referrer to more easily follow-up on their referrals to My Aged Care by provision of a confirmation ID



For further information, go to My Aged Care  
1800 836 799 | [www.dss.gov.au/myagedcare](http://www.dss.gov.au/myagedcare)

## WHAT ARE THE CHANGES

Submitting a referral to My Aged Care using the health professional webform requires referrers to submit additional information, including mandatory completion of the same client function questions that form the basis of screening (shown in Attachment A). It is this additional information that supports automation.

Automatic processing is initiated in the following scenarios:

- Referrer is a health professional;
- Client meets basic eligibility criteria for Commonwealth Home Support Programme services (aged 65 years and over and 50 years and over for Aboriginal and Torres Strait Islander people); and
- Client has no existing current care approvals or activities in progress with My Aged Care.

Web inbound referrals that do not meet the criteria above will continue to be processed manually by the contact centre.

When an inbound referral is automatically processed by the My Aged Care system, the following actions will occur:

1. Creation of an activity for the inbound referral; the ID for this activity is provided to the referrer when they submit the webform to assist follow-up of referrals
2. If the client does not already exist in the My Aged Care system, creation of a client record and identity matching to ensure existing care approvals are visible. Client data supplied in the inbound referral is automatically populated into the client record.
3. If the client already exists within the My Aged Care system, merging of relevant data from the inbound referral into the client record.
4. A PDF copy of the original referral and any other documents supplied by the referrer will be attached to the client record
5. Creation of records within the My Aged Care system for carers and/or support people identified in the inbound referral
6. Creation of a screening record and transfer of client function data from the inbound referral into the National Screening and Assessment Form
7. Creation of notes on the Automation process that highlight the referral was created as a result of automation and indicate any areas of the referral that the assessor should be aware of. These notes are visible in the 'Notes' section of the client record in the assessor portal.
8. Creation and sending of a referral to the relevant assessment organisation based on the hospital or client address and the recommendation for assessment provider by the referrer



Automation is also dependent on the quality of the information provided by the referrer with inaccurate recording of identifiers, for example Medicare number, likely to result in the need for contact centre intervention. Some referrals will proceed part-way through automation before manual intervention by the contact centre is required.

## HOW TO TELL IF A REFERRAL HAS BEEN AUTOMATICALLY CREATED

Referrals created automatically will be sent to assessors in the same way as other assessment referrals and will be found in the Incoming Referrals tab.

To identify whether a referral has been automatically created, navigate to the client record linked to the referral and open the Notes tab. If the referral has been automatically created, a note will be visible that clearly states “This client has been automatically created from a web referral submission from the Aged Care Website. Please review the processing notes from the list below and resolve if necessary”.

The note will also include a list of ‘Warnings’ generated during the automation process. These warnings will notify the assessor of any issues that they may need to be aware of or follow-up on (see ‘Changes to Existing Practices’).

The screenshot shows a web interface for a client record titled "Erika Geddes Notes". The "Notes" tab is selected in the navigation bar. Below the navigation bar, there are filter options for "Type" and "Note status", both set to "Please select" and "All" respectively. A "Filter" button is present. Below the filters, there is a table of notes. The table has columns for "Date created", "End date", "Note type", "Description", "Created by organisation", "Created by outlet", and "Note status". The "Description" column for the first note is circled in red. The note text reads: "This client has been automatically created from a Web referral submission from the Aged Care Website. Please review the processing notes from the list below and resolve if necessary. Person 209 DVA ID is invalid Person 209 - This client had a client record in existence prior to receipt of the inbound referral." There are also "Add a note" and "Edit" links next to the note.

## ADDITIONAL INFORMATION AVAILABLE FOR AUTOMATICALLY CREATED REFERRALS

Information collected from referrers will be mapped to existing fields in the assessor portal. Changes to this mapping are summarised below:

1. Screening information (answers provided by the health professional referrer, not the contact centre) will be available through the Plans tab of the client record (in the NSAF) and the PDF of the inbound referral.



2. Client representative details will now include an indication of whether the representative would like to be present at any assessments
3. A complete copy of the information provided by the referrer will be available as a PDF from the 'Attachments' tab of the Client Record. This PDF includes answers to the screening questions, details of carers and hospital discharge information for patients leaving hospital. This PDF is attached for all clients referred to My Aged Care using the new webform, regardless of whether the referral to the assessment organisation has been automated.

Hint: Some information, such as the types of services that referrer is recommending for a client are only visible on the PDF of the inbound referral. Assessors should check attachments in the Client Record to view this information.

## CHANGES TO EXISTING PRACTICES

Assessors will handle referrals that have been automatically generated by the My Aged Care system in the same manner to those generated manually by the contact centre. This includes transferring the client to another assessment organisation if you think that they have been sent to you in error.

The only change to existing practice is the need to look at the Notes section and follow-up on any warnings generated by the system. The full list of warnings is shown in Attachment B, including the action that the assessor should take in this scenario. The department will emphasise to health professional referrers the advantages of providing complete and accurate information within the webform to minimise the need for assessor follow up wherever possible.



## Attachment A: Screening questions in the webform

### Make a referral

Print 



#### Reason for referral

\* Required

Referral reason \*

- Please select - 

Why does the patient need an assessment or access to aged care services? \*

#### Supporting documentation

Document description

- Please select - 

Attachment

No file chosen

Upload



#### Patient concerns

Are there concerns with any of the following?

Please select all that apply.

- Carer Stress
- Health concerns
- Incontinence
- Loneliness/social isolation
- Memory loss or confusion
- Pain
- Recent falls
- Safety in their home
- Special needs
- Weight loss/nutritional concern

## Patient function

Based on your knowledge of the patient's form, please select the option that best describes patient function

Based on your knowledge is the patient able to:

	Without help	With a little help	With a lot of help	Completely unable	Not known
get out of bed or chairs easily? *	<input type="radio"/>				
	Without help	With some help	Completely unable	Not known	
get dressed? *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
eat their meals? *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
go to the toilet? *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
walk easily? *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
shower or have a bath? *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
manage their own medications? *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
travel in the community? *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
go shopping for groceries? *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
prepare their own meals? *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
do housework? *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
manage their money? *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

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**Attachment B: Warnings generated during automation and assessor actions**

ID	Message	Explanation of error	Assessor action
<b>Warnings - frequently generated</b>			
209	This client had a client record in existence prior to receipt of the inbound referral. During creation of this referral, existing fields are not overwritten. Please review contact details on the inbound referral.	Client already exists in the My Aged Care system; corresponding fields in the inbound referral cannot be copied over populated fields in the Client record	Ask client if their contact details have changed between their initial contact with My Aged Care and this assessment; update if required
304	The referrer has attached additional information to the inbound referral. Please ensure you are able to read the following attachments: <Activity.Attachment Names>	If the referrer sends through attachments with the referral, this warning is generated to flag their presence. There is a small risk that the attachments will not be present.	Check that the attachments identified in the warning message by name are visible in the Attachments tab for the client. If not, please contact the referrer or client depending on the type of attachment.
703	The referrer has indicated a location of assessment that is not the client's usual address. Please refer to the inbound referral for details and contact the client to confirm the location of the assessment.	Referrers can indicate a location of assessment for comprehensive assessments. If the location of assessment is different to the client's usual residence, a referral is generated based on the usual residence and this warning is generated.	Check the address for the assessment during initial contact; transfer to correct assessment organisation if required
705	The client was discharged from hospital to a location that is not their usual residence. Please consider contacting the client at this interim location to confirm the location of the assessment.	Referrers must include a discharge address for clients leaving hospital (including an option to indicate the client is returning to their usual address). If the discharge address is not the client's usual residence, this warning is generated. The referral for assessment is generated based on the address of the usual residence.	
707	This referral has been generated using the client's usual residence address from the inbound referral. This address did not match the home address on the client's original client record. Please review contact details with the client.	The client referred was matched with an existing client record and this existing person already had a home address. In this scenario the address from the inbound referral does not replace the existing address in the client record. The referral to the assessment organisation is generated against the client's Usual Residence address indicated in the inbound referral.	

ID	Message	Explanation of error	Assessor action
<b>Warnings – infrequently generated</b>			
104	Address provided in the inbound referral is not valid; please review	System check of address indicates the address provided may not be correct	Check the address for the client and update the Client Record where possible
105	Not all mandatory address fields were present on the inbound referral and so no address for the client has been created; please review	System check has revealed address fields not completed in inbound referral	
106	The address supplied for the client in the inbound referral could not be copied into the existing client record; please review	Client already exists in Siebel with existing address details; the address in the inbound referral cannot be copied over these fields	
205	DVA ID is invalid	System check of DVA number indicates the number may not be correct	Check the DVA number for the client during assessment and update if required.
208	Phone number for the client provided in the inbound referral may not be valid, please check	System check of phone number indicates the number provided may not be correct	If the client is unable to be contacted using the number provided, please contact identified support people or the referrer.
251	Related persons (i.e. GP, support people for the client) were identified in the inbound referral but were not able to be created on the system; please review	Details provided for GP and support people were not able to be successfully created on the system and linked to the client record	Check details of client's identified support people during assessment and create within My Aged Care if relevant.
261	Roles and Relationships (i.e. GP, support people for the client) were identified in the inbound referral but were not able to be created on the system; please review		Note that details of identified support people can still be viewed on the PDF of the inbound referral.
303	Files with duplicate attachment names may be present for this client; please review	If the referrer sends through multiple attachments with the same name, the attachment with the duplicate name is not attached to the activity or the client	Check the documents sent through by the referrer with the inbound referral. If details in the inbound referral indicate a document may be missing (for example a referrer makes a reference to a wound management plan and there is not one attached), contact the referrer.