



Australian Government
Department of Social Services



myagedcare

My Aged Care Guidance for Providers

June 2015

Document revisions

Information on the following areas has been included in the June 2015 version of the My Aged Care Guidance for Providers document:

- My Aged Care in Victoria and Western Australia
- How My Aged Care will support people with diverse needs
- Referral to waitlist
- Tasks and notifications
- Reports.

The latest version of this document is available at dss.gov.au/MyAgedCare

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1 Purpose of the document

The purpose of My Aged Care Guidance for Providers (this document) is to help service providers understand how they will interact with My Aged Care. This document provides contextual information about new concepts and functions that service providers are expected to undertake via the My Aged Care provider portal.

This document should be read in conjunction with the 'My Aged Care Provider Portal User Guide' (Provider Portal User Guide), which outlines the steps to follow to undertake the new functions within the provider portal. It is recommended that this document is read before the Provider Portal User Guide.

These two documents do not replace existing programme documentation. You should continue to refer to relevant guidelines and manuals. For example:

- Commonwealth Home Support Programme – Programme Manual
- Guide to Aged Care Law
- Home Care Packages Programme Guidelines – July 2014.

1.1 Document key



This is used to highlight a point that service providers need to pay particular attention to.

Administrator

Team Leader

Staff Member

This is used to highlight a function that a person with a particular role within the provider portal (Administrator, Team Leader, Staff Member) can undertake.

1.2 Key terms

Administrator

Team Leader

Staff Member

This information is relevant for people performing Administrator, Team Leader or Staff Member roles in the provider portal.

Table One: Key terms and descriptions

Key term	Description
ACAT	Aged Care Assessment Teams (ACATs) conduct face-to-face comprehensive assessments to determine a client's eligibility for care types under the <i>Aged Care Act 1997</i> , with approval subject to a decision by an ACAT Delegate.
Action plan	A summary of the outcomes of screening conducted by My Aged Care contact centre staff. An action plan includes information about activities that will facilitate appropriate assessment or service referrals. Assessors, service providers and clients can view a client's action plan via the My Aged Care portals.
Administrator	<p>The person nominated on the My Aged Care Organisation Administrator Registration Form to be the first person from an organisation to log in to the My Aged Care provider portal. A person can also be assigned an Administrator role within the portal for either the organisation or one or more outlets.</p> <p>Administrators are responsible for setting up the organisation, including managing outlets, services information and staff accounts for all outlets in the portal.</p> <p>Administrators for particular outlets are responsible for managing services and staff accounts only for the outlets they are assigned.</p>
AUSkey	AUSkey is a secure login that identifies you when you use participating government online services on behalf of your business. AUSkeys are obtained from the Australian Business Register, and registration is free.
CHSP	<p>From 1 July 2015, the Commonwealth Home Support Programme (CHSP) will bring together:</p> <ul style="list-style-type: none"> • Commonwealth Home and Community Care (HACC) Program • Planned respite from the National Respite for Carers Program (NRCP) • Day Therapy Centres (DTC) Program • Assistance with Care and Housing for the Aged (ACHA) Program.
Client record	People seeking access to aged care services will have a client record created by My Aged Care contact centre staff. The client record will include client details (and carer or representative details), details about assessments and the action support plan(s), and information about

Key term	Description
	<p>service(s) received. Clients will be asked to provide consent to enable their client record to be created and shared with assessors and service providers.</p> <p>Assessors and service providers will update information on the client record, and clients and their representatives will be able to view this information on the My Aged Care client portal, via myGov.</p>
Client service information	<p>Information about services that a provider delivers to a client. The provider is required to enter this information on the client record via the My Aged Care provider portal. Clients and their representatives will be able to view this information on the My Aged Care client portal, via myGov.</p>
Inbound referral form	<p>An online form accessed from the My Aged Care website. The form can be used to recommend a person for aged care services. The form may initiate registration, screening, assessment and referral for service.</p>
NSAF	<p>National Screening and Assessment Form (NSAF) used by My Aged Care contact centre staff and assessors (RAS and ACATs) to ensure a nationally consistent and holistic screening and assessment process.</p>
Outlet	<p>Represents how service providers organise their services in the provider portal. An outlet could represent a physical location, like a residential care facility, or a section of an organisation that delivers services, like home support, to a particular area.</p> <p>Electronic referrals will be sent by My Aged Care contact centre staff and assessors for services organised within the outlet(s). Service provider staff will also be allocated to outlets.</p>
RAS	<p>The My Aged Care Regional Assessment Service (RAS) will conduct a face-to-face home support assessment for clients needing access to Commonwealth Home Support Programme (CHSP) services.</p>
Reassessment	<p>A reassessment will be undertaken when there is a significant change in a client's needs or circumstances which affect the objectives of the existing support plan.</p>
Referral code	<p>A five digit code given to the client by My Aged Care contact centre staff, or assessors to allow them to visit different service providers to discuss their needs prior to choosing their preferred provider. Referral codes are generated for individual services.</p> <p>Clients can choose to have a referral code given to them or choose an electronic referral method.</p>
Referral for assessment	<p>A referral sent by My Aged Care contact centre staff requesting an assessment (home support or comprehensive) for a client.</p>
Referral for service	<p>A referral sent by either My Aged Care contact centre staff or assessors requesting a service for a client. Referrals can be sent electronically, or a client can be issued a referral code.</p>

Key term	Description
Representative	<p>Clients can nominate one or more representative(s), (e.g. a carer), to act on their behalf. The My Aged Care system enables a representative to be classified as Regular or Authorised. You will also need to indicate a 'representative type': Financial, Care, or Financial and Care.</p> <p>Regular Representatives are nominated by the client, for instance a family member can be nominated as a representative so they can view the client record. This consent can be given verbally, in writing or in any other way that communicates the authority to act on behalf of the client.</p> <p>Authorised Representatives are generally able to act for a client based on provisions within federal, state or territory law, for instance, Power of Attorney.</p> <p>When adding a representative to a client's record, you must indicate that consent has been obtained from all parties in order for the relationship to be established in the system.</p>
Review	<p>An evaluation of a client's support plan undertaken by the RAS. A review can be requested by the client, service provider, or scheduled by the RAS. The review may result in a change in services, or a further assessment.</p>
Service delivery area	<p>The area where an organisation delivers services. This can be from a set location (provider location) or to an area where the service is provided to the client in their own home (at client location).</p>
Service finders	<p>A search function available on the My Aged Care website that allows an individual to view information about services.</p>
Staff Member	<p>A person who is assigned a Staff Member role in the provider portal will be responsible for adding and updating client service information on the client record.</p>
Support plan	<p>A plan developed by the RAS or ACAT with the client. The support plan identifies the client's needs, goals and service preferences. Assessors and service providers will be able to view a client's support plan via the My Aged Care portals. Clients and their representatives will be able to view this information on the My Aged Care client portal via myGov.</p>
Team Leader	<p>A person who is assigned the Team Leader role in the provider portal will have the same functions as a Staff Member role in the portal, and additionally, be responsible for managing referrals.</p>
Wallet check	<p>An identification check that an assessor or service provider will undertake to ensure duplicate client records are not created. The wallet check involves sighting two documents that identify the client, and noting this on the client's record.</p>

2 Introduction to My Aged Care

Administrator

Team Leader

Staff Member

This information is relevant for people performing Administrator, Team Leader or Staff Member roles in the provider portal.

The My Aged Care vision is to 'make it easier for older people, their families, and carers to access information on ageing and aged care, have their needs assessed and be supported to locate and access services available to them.'

My Aged Care was introduced on 1 July 2013 and consists of the My Aged Care contact centre (1800 200 422) and website (myagedcare.gov.au). Since its introduction My Aged Care has provided:

- Information about aged care to consumers, family members and carers
- Information for service providers
- Online service finders that provide information about service providers and assessors
- Online fee estimators for Home Care Packages (HCP) and Aged Care Homes.

The Telephone Interpreting Service and the National Relay Service is available to assist people who communicate in language(s) other than English, and people who have a hearing or speech impairment.

2.1 Changes to My Aged Care in 2015

My Aged Care will be expanded in 2015. The table below details what is being introduced nationally (except in Victoria and Western Australia), and why it is being introduced.

Table Two: Changes to My Aged Care in 2015

What is being introduced	Why it is being introduced
Client record	To facilitate the collection and sharing of client information.
My Aged Care Regional Assessment Service (RAS)	To conduct face-to-face assessments for clients needing to access Commonwealth Home Support Programme (CHSP) services.
National Screening and Assessment Form (NSAF)	To ensure a nationally consistent and holistic screening and assessment process. The NSAF will be used by contact centre staff, the RAS and existing ACATs.
Offline assessment capability (myAssessor app)	The myAssessor app will provide the ability for assessors to conduct assessments offline.
Web-based portals for clients, assessors and service providers	<p>My Aged Care client portal: for clients to view their client record and update personal details.</p> <p>My Aged Care assessor portal: for assessors to manage referrals for assessment, use the NSAF, send referrals for service, and update the client record.</p> <p>My Aged Care provider portal: for service providers to manage service information, referrals for service and update the client record.</p>
Electronic matching for service(s)	To provide the ability to search for services, using the My Aged Care service finders, that meet client needs/preferences.
Referral for service(s)	To provide the ability to refer for service(s) electronically, and through the use of a referral code.
Centralised waitlist	Waitlist for clients held within the My Aged Care system, but managed by providers. Service providers can manage a waitlist for their organisation via the provider portal.
Service providers will self-manage information about the services they deliver	To provide information on the service finders on the My Aged Care website, and support accurate referral of clients to services.

What is being introduced	Why it is being introduced
Enhanced service finders that include information about non-Commonwealth funded services	To enable the provision of information about non-Commonwealth funded aged care services to clients and the public.

These changes will result in:

- A consistent, streamlined and holistic assessment of clients
- Better access to accurate client and service information (for clients, representatives, service providers and assessors)
- Appropriate and timely referrals for assessment and services.

2.2 My Aged Care in Victoria and Western Australia

Due to the continued operation of the jointly government funded Home and Community Care (HACC) program in Victoria and Western Australia, My Aged Care will operate differently in these states. This section seeks to set out the differences in those jurisdictions and how this will impact both clients and service providers.

2.2.1 My Aged Care in Victoria

In Victoria, there are differences to the national model in terms of the manner in which assessment and service referrals are handled. My Aged Care will operate as outlined below:

My Aged Care contact centre

- The My Aged Care contact centre will register and screen clients and make referrals for assessment to both ACATs and HACC assessors.

Assessors in Victoria

- The My Aged Care Regional Assessment Service (RAS) will not operate – the HACC Assessment Service (HAS) will continue to perform assessments and make referrals outside the My Aged Care system
- However, the HAS will access the My Aged Care assessor portal from 1 July 2015 in order to receive referrals for assessment and access client records (including screening information)
- The HAS, at least initially, will not use My Aged Care to conduct assessments, record client information or make referrals to service providers. This will continue to be subject to the normal business practices of the HAS, with the value of having a picture of the client's circumstances at the time of the referral for assessment (via access to the My Aged Care client record).
- The ACAS will transition to My Aged Care in 2015.

Service providers in Victoria

- Victorian HACC service information will not be displayed on the service finders on the My Aged Care website, and Victorian HACC providers will not receive electronic referrals for service from the My Aged Care
- Commonwealth Home Support Programme (CHSP) providers will maintain information about the services they provide, which will be publicly displayed on the service finders on the My Aged Care website. However, CHSP providers will not receive electronic referrals from the HAS (via the My Aged Care provider portal). They may, in certain circumstances, receive electronic service referrals direct from the My Aged Care contact centre
- Home Care Package (HCP), Transition Care (TCP), and Residential Care (Residential) providers will receive referrals via the My Aged Care provider portal in line with the national model (outlined in Section 3.1.2).

The Department is working with the Victorian government to transition HAS assessors and HACC service information into My Aged Care by mid-2016.

2.2.2 My Aged Care in Western Australia

In Western Australia, there are more significant differences to the national model. My Aged Care will operate as outlined below:

My Aged Care contact centre

- My Aged Care contact centre staff will refer all people seeking access to aged care services to the existing WA intake point, without registering them for a client record, or screening them to understand their aged care needs and the appropriate referral pathway.

Assessors in Western Australia

- The My Aged Care RAS will not operate – HACC assessment services will continue
- Once ACATs are using the My Aged Care assessor portal, they will be required to register people (to create a client record) prior to undertaking a comprehensive assessment using the NSAF. The client record will not contain any previous assessment or service information collected by the WA intake point.
- ACATs will transition to My Aged Care in 2015.

Service providers in Western Australia

- The Western Australian HACC program will not be represented in the service finders, and HACC providers will not receive electronic referrals for HACC services
- CHSP providers will be able to manage their service information, which will be represented in the service finders on the My Aged Care website. CHSP providers will not receive electronic referrals from My Aged Care
- HCP, TCP and Residential providers will receive referrals via the My Aged Care provider portal in line with the national model (outlined in Section 3.1.2).

The Department will continue to work with the Western Australian government to work towards utilisation of My Aged Care for the purposes of creating a central client record, screening, assessment and referral for services.

2.3 How My Aged Care will support people with diverse needs

My Aged Care will support people with diverse needs in the following ways:

- Translated materials are available on the My Aged Care website and people can access the Translating and Interpreting Service (TIS). People who prefer to communicate in a language other than English can phone the TIS on 131 450. TIS staff will facilitate a call to the My Aged Care contact centre on the person's behalf
- The National Relay Service is available for people who are deaf, or hearing or speech impaired
- Training has been provided to My Aged Care contact centre staff and assessors to ensure they can work effectively with people with diverse needs, including people from CALD backgrounds and Aboriginal and Torres Strait Islander people
- The National Screening and Assessment Form (NSAF) will be used by My Aged Care contact centre staff and assessors to assist with identifying clients who have diverse needs
- Allowing service providers to indicate if their services are tailored for diverse needs groups (i.e. LGBTI). This information will display publically on the service finders on the My Aged Care website
- Materials on the My Aged Care website are compliant with the Web Content Accessibility Guidelines version 2.0.

Where it is not possible to conduct registration or screening over the phone, or the client expresses a desire not to participate, the client will be referred directly to face-to-face assessment.

2.4 Fees

It is important that consumers understand the potential fees that they may be expected to pay for services early in their interaction with the aged care system. The My Aged Care website, contact centre and assessors will all assist to manage consumer expectations around fees.

The My Aged Care website (myagedcare.gov.au) provides information about the aged care system, including fees. The Home Care Package fee estimator and Aged Care Home fee estimator allow consumers to estimate their possible fees. The My Aged Care contact centre (1800 200 422) can also provide fee estimates over the phone.

If a person has not considered the payment of fees prior to being contacted by an assessor or service provider, it is expected that the assessor or service provider provides information about fees to the client.



Service providers do not have to enter information about fees in the client record.

3 Using My Aged Care

Administrator

Team Leader

Staff Member

This information is relevant for people performing Administrator, Team Leader or Staff Member roles in the provider portal.

In mid May 2015, the My Aged Care provider portal became available. Service providers who have submitted their My Aged Care Organisation Administrator Registration Form to the Department, and have an AUSkey, are able to access the provider portal. Information about the first time login process for the provider portal is in the Provider Portal User Guide.

Service providers need to set up their organisation within the provider portal before 1 July 2015 by:

- ensuring that the information about the services you deliver is correct
- assigning service items to outlet(s)
- making the services operational
- assigning staff to the outlet(s)
- making the outlet(s) active.

It is critically important that information about the services you provide is kept up to date. The information is publicly displayed on the service finders on the My Aged Care website (myagedcare.gov.au), and is used by contact centre staff and assessors to ensure accurate referrals to service(s).



If your services are not operational and your outlets are not active, your services will not display in the service finder and you will not receive electronic referrals from My Aged Care from 1 July 2015.

3.1 Referrals

From July 2015, people seeking access to aged care services for the first time, or people whose needs have changed, will need to contact the My Aged Care contact centre to discuss their aged care needs and have a client record created. The interactions people have with My Aged Care are described in Diagram 1 on page 20.



Clients receiving services prior to July 2015 do not need to register with My Aged Care unless their needs and/or circumstances change.

If Commonwealth funded service providers are directly approached by new clients seeking aged care services, service providers should refer the clients to My Aged Care. My Aged Care contact centre staff will then facilitate registration which creates a client record. My Aged Care contact centre staff will ask a series of questions to understand client's needs, and send referrals for assessment and/or service(s), as required.

Service providers can assist clients with the My Aged Care registration process by:

- Recording client details in an inbound referral form (accessed from myagedcare.gov.au) that is sent to the My Aged Care contact centre
- Calling the My Aged Care contact centre with the person to facilitate registration and screening
- Sending a fax with information about the person.

As any resulting referrals for service(s) will be based on client choice, the client can nominate to return to the service provider who assisted them to contact My Aged Care.



In cases where it is apparent that urgent care is required, service delivery may be provided before a client has contacted My Aged Care. Ultimately clients need to be registered with My Aged Care, and have their broader needs considered.

3.1.1 Commonwealth Home Support Programme providers

From July 2015, CHSP providers will receive electronic referrals for service(s) via the provider portal.

Referrals from the My Aged Care contact centre

Most clients who contact the contact centre will be referred for a home support assessment prior to being referred for CHSP services. However, clients may be referred directly to service if their needs are episodic or limited. For example, the delivery of meals due to the unplanned absence of a carer.

My Aged Care contact centre staff can also send concurrent referrals for assessment and CHSP services.

Referrals from the My Aged Care Regional Assessment Service

From July 2015, the My Aged Care Regional Assessment Service (except in Victoria and Western Australia) will send electronic referrals for services to CHSP providers, or provide the client with a referral code. For details about how My Aged Care will operate in Victoria and Western Australia see Section 2.2.

Referrals from hospital

Where urgent CHSP services are needed to discharge patients safely to their homes, hospitals in most states and territories will be able to contact service providers directly to organise these services. Urgent services are those services that are:

- Required to be in place within a short period of time (i.e. within 3 days);
- Are not covered by post-acute care; and
- Are short term and/or episodic in nature.

These services include home modifications, meals, nursing and transport. For direct to service referrals from hospitals, acceptance of the referral will be based on a provider's capacity to take on new clients and the relative needs of clients waiting for service.

3.1.2 Home Care Package, Transition Care, and Residential Care providers

From July 2015, HCP, TCP and Residential providers will receive electronic referrals for service(s) via the provider portal. Initially, referrals for service(s) will only be sent by My Aged Care contact centre staff (i.e. not ACATs).

Referrals from the My Aged Care contact centre

Referrals will only be sent by contact centre staff if, during the registration process, it becomes apparent that the client has an existing approval for aged care services under the *Aged Care Act 1997* (the Act). In these instances, the client will not be screened or assessed (and therefore the client record may not contain a completed action or support plan), and will be referred directly to service. My Aged Care contact centre staff can also provide clients with a referral code for service(s).



If a HCP, TCP or Residential provider accepts a direct to service referral from the My Aged Care contact centre, service providers will need to use current processes to view the Aged Care Client Record (ACCR) to satisfy themselves that the client has the appropriate approval for the service.

Referrals from ACATs

ACATs will continue to assess people for access to aged care service(s) funded under the Act: Home Care Packages, Residential Care (including Residential Respite), and the Transition Care Program.

ACATs in all jurisdictions (except QLD and WA) will commence using the assessor portal to accept/reject referrals from July 2015, which provides access to the client record and screening information prior to undertaking their assessment. However, ACATs will not use the NSAF or send referrals to HCP, TCP, and Residential providers (including Residential Respite) using the My Aged Care assessor portal until they transition to using the full functionality of My Aged Care.

ACATs will transition to using the full functionality of the assessor portal state-by-state from September - December 2015. Until transition, ACATs will continue to use current processes and systems to complete assessments and make referrals.

After transition, ACATs will use the My Aged Care assessor portal to conduct comprehensive assessments, create support plans, make Delegate decisions and make referrals to service(s) or waitlists. Therefore, HCP, TCP and Residential providers will receive referrals for service from ACATs via the My Aged Care provider portal after transition. ACATs will also be able to provide referral codes to clients who want to approach service providers directly.

3.1.3 Multi-Purpose Services and National Aboriginal and Torres Strait Islander Flexible Aged Care providers

Multi-Purpose Services (MPS) and National Aboriginal and Torres Strait Islander Flexible Aged Care providers can use the My Aged Care provider portal to maintain information about the services they provide (which will publicly display on the My Aged Care service finders on the My Aged Care website), and receive referrals for service.

It is expected that assessors will continue to refer clients to MPS and National Aboriginal and Torres Strait Islander Flexible Care Programme providers, including those providers who are not using the My Aged Care provider portal. People will also be able to contact these providers directly (i.e. without contacting My Aged Care).

3.2 Referrals to waitlist

From July 2015, service providers will need to maintain availability information. This information will be displayed on the service finders via the My Aged Care website, and be used by contact centre staff and assessors to send referrals for available services.

You will be able to use the waitlist function within the My Aged Care provider portal. This will allow providers to centrally manage a waitlist for clients within the My Aged Care system. Clients may be on a number of centrally managed waitlists. When a provider accepts a client, the client will be automatically removed from other waitlists they were on for the particular service type. To receive referrals to waitlist ensure that the 'waitlist availability' for the specific service is 'on'.



Service providers do not have to use the waitlist function within the My Aged Care provider portal, and can continue to maintain their current waitlists.

There will be no bulk transfers of clients from existing provider waitlists (i.e. managed outside of the My Aged Care provider portal prior to July 2015) to My Aged Care. Service providers may want to encourage people on their waitlists to register with My Aged Care. It is important that clients understand that registering with My Aged Care may lead to a further assessment being undertaken, and the subsequent identification of available services that meet the client's needs, or the placement of the client on additional waitlists with other service providers.



It is important to note that if a client chooses to register with My Aged Care, the screening and assessment process undertaken by My Aged Care may result in a recommendation for different service types, or the client may select a different service provider to be referred to.

3.3 Service provider support

The Department has developed a range of materials and supporting mechanisms, including videos, FAQs, User Guides, and fact sheets to help service providers understand how to use the provider portal. These materials are available from dss.gov.au/MyAgedCare.

The My Aged Care service provider and assessor helpline (1800 836 799) can also assist with enquiries relating to the My Aged Care system and provide technical support. The helpline will be available between 8am to 8pm Monday to Friday and 10am to 2pm Saturday, local time across Australia.

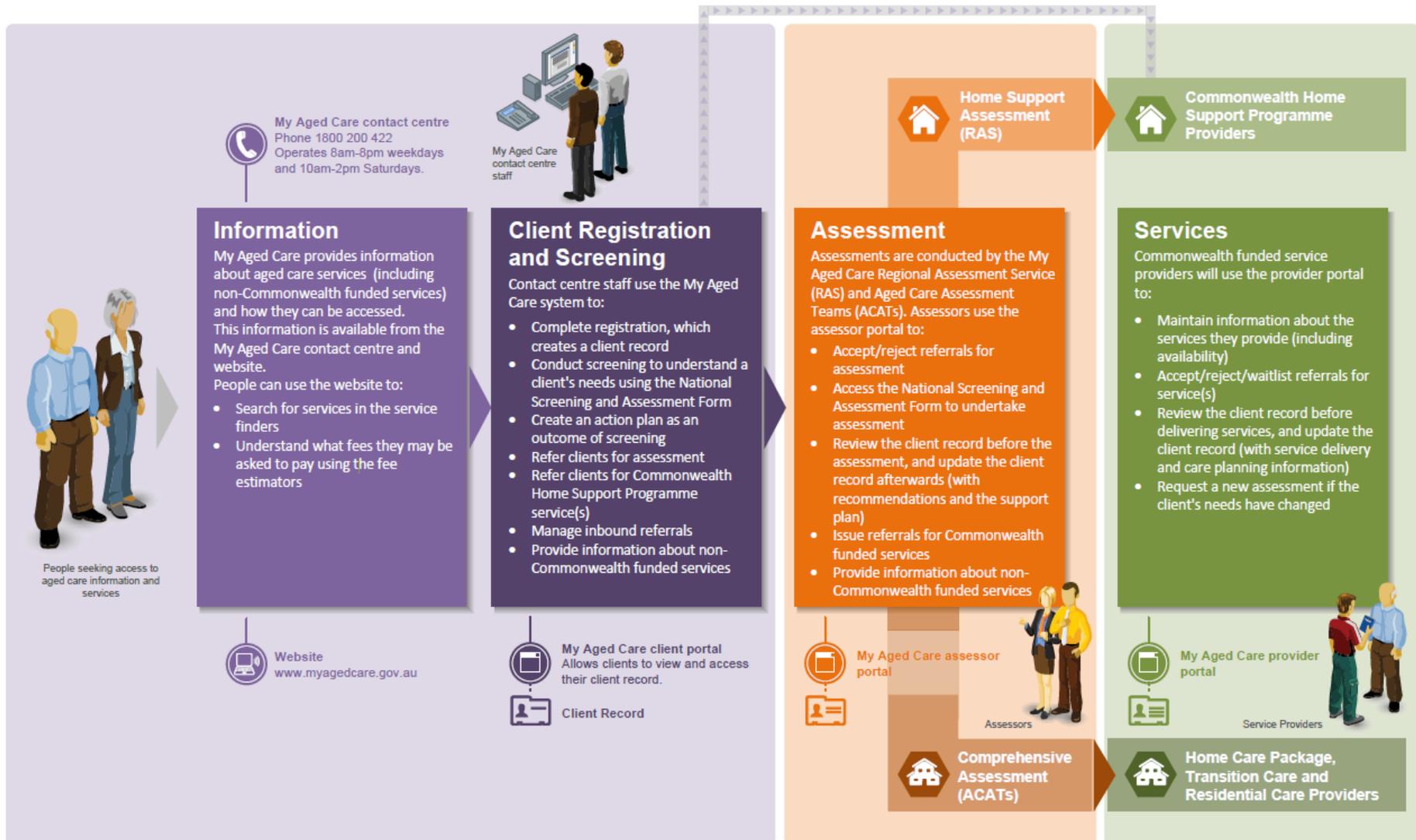


Diagram One: My Aged Care client interactions

4 Overview of contact centre staff and assessor roles

Administrator

Team Leader

Staff Member

This information is relevant for people performing Administrator, Team Leader or Staff Member roles in the provider portal.

The nationally consistent screening and assessment process will be undertaken by My Aged Care contact centre staff, the RAS and existing ACATs.

Screening, home support assessment (undertaken by the RAS) and comprehensive assessment (undertaken by ACATs) will all be conducted using the National Screening and Assessment Form (NSAF). The NSAF has been designed so that assessment will build on the screening information collected by My Aged Care contact centre staff.

The section below outlines the functions that will be undertaken by contact centre staff and assessors to support a person to access aged care services.

4.1 Registration by My Aged Care contact centre staff

If a person calls the My Aged Care contact centre seeking access to aged care services, contact centre staff will seek consent to register the caller with My Aged Care and, if consent is received create a client record. The client will be allocated an Aged Care User ID as part of the registration process.

Registration involves the collection of a basic set of client information (e.g. a Medicare number, name and date of birth), which is then verified with information held at the Department of Human Services, and by assessors / service providers sighting **two types** of client identification documents. This process is important to ensure that the client record is unique, and that duplicates are not created.

The document types must come from the list below.

Identification documents can include the following:

- Medicare Card
- Department of Veterans' (DVA) Card
- Driver's License
- Health Care Card
- Passport
- Birth Certificate
- Birth Card
- Citizenship/Naturalisation Certificate
- Photo Card
- Tertiary Student ID
- Other Identity Document
- Other License/Permit
- Australian Aged Pension Card
- Pensioner Concession Card
- State Government Card
- State Government Disability
- Australian Marriage Certificate.
- Mortgage Documentation

- Lease/Rent Agreement
- Land Title Office Record
- Bank Statement
- Council Rates Notice
- Utility Bill
- Australian Bank Card
- Automobile Membership
- Seniors Card
- Registered Club Membership



It is expected that whoever has face-to-face contact with the client in the first instance (i.e. an assessor or service provider) will sight client identification and note this on the client record. The wallet check only needs to occur once.

Case Study: Registration and screening

Background

Enid is a 79 year old woman who has been having difficulty with everyday tasks due to her arthritis and recent diagnosis of diabetes. She has particular difficulty with getting out of the house to go grocery shopping and to visit her GP and pharmacy. Enid recognises and believes that eating fresh food, exercising and the ability to visit her doctor and pharmacist for advice on medication management is important for her health and quality of life. She is also not visiting her friends and family as much as she used to, and is beginning to feel lonely and isolated. Enid has heard about other older people receiving aged care services but she assumes that she needs a doctor's referral to get started.

Inbound referral

Enid eventually asks her doctor for some information on how to get help at home. Her doctor sends a referral via an inbound referral form on the My Aged Care website to the My Aged Care contact centre. The inbound referral contains information against the following sections:

- the referrer's name and contact details
- the client's name and contact details
- the referrer's relationship to the client (for example, as a GP or community nurse)
- information about why the client is being referred to My Aged Care
- any additional information that may support the referral, including a discharge or shared health summary.

Registration and screening

After receiving the inbound referral form, a My Aged Care contact centre staff member calls Enid to discuss her circumstances. The contact centre staff member receives Enid's consent to register her details with My Aged Care and undertake a brief telephone screening to determine what services could meet her needs.

Referral for assessment

As a result of the information collected during screening, and a discussion with Enid about the best options to meet her needs, the contact centre staff member organises a referral to be sent for a home support assessment, to be completed by the RAS.

4.2 The client record



The client needs to consent to having a client record created.

The creation of a client record will reduce the number of times a person has to repeat their story. Clients will be asked to provide consent to enable their client record to be appropriately shared with assessors and service providers.

When service providers receive referrals for service(s) from the My Aged Care contact centre, RAS or ACATs, they will be able to view all information in the client record except the client's full address and phone number. Service providers will be able to see the client's suburb prior to accepting the referral.

The client record can include the following information:

- Personal information (date of birth, place of birth, relationship status)
- Address details
- Communication requirements
- Representative or carer details
- Screening outcomes and action plans
- Completed NSAFs, assessment outcomes and support plans
- Payment details (pension status)
- Health insurance details
- Services in place
- Notes and observations
- Sensitive notes.*

** Sensitive notes allow information that the client considers private (but still chooses to disclose) to be collected on the system. It is only viewable at a higher level of access at the contact centre and in the assessor portal.*



Service providers will only be able to view a client's full address and phone number after accepting a referral for service.

4.2.1 Who can view and update the client record

The table below outlines who can view and update the client record.

Table Three: Who can view and update the client record

Who	Where can they view the client record?	What can they update?
Clients (and their representatives)	My Aged Care client portal via myGov	Contact details
Contact centre staff	Contact centre system	Contact details, screening outcomes, (including action plans), and referral information
Assessors	My Aged Care assessor portal	Contact details, assessment outcomes, (including support plans), and referral information
Service providers	My Aged Care provider portal	Service delivery information



If a client needs assistance to access their client record via myGov, refer the client to the My Aged Care contact centre (1800 200 422).

4.3 Screening and creating an action plan

Contact centre staff will conduct screening by asking a series of questions over the phone to understand a client’s needs and determine the appropriate client pathway. The outcomes from screening are documented in an action plan.

Where it is not possible to conduct screening over the phone, or the client does not want to participate, the client will be referred directly to face-to-face assessment.

The action plan forms part of the client record that can be viewed by clients via the My Aged Care client portal. Assessors and service providers who have received a referral for assessment or service can also view the action plan via the My Aged Care assessor or provider portals. After screening, clients can be:

- Referred to an assessment organisation for a face-to-face assessment of their needs (either home support or comprehensive); and/or
- Referred directly to CHSP services; and/or
- Provided with information about other Commonwealth funded aged care services (such as those provided by MPS or under the National Aboriginal and Torres Strait Islander Flexible Care Programme), and non-Commonwealth funded aged care services.

4.4 Undertaking assessments and developing a support plan

RAS and ACATs will use the My Aged Care assessor portal to:

- Manage referrals for assessment
- Conduct assessments using the NSAF
- Review and update client records with the support plan and assessment outcomes
- Refer clients to service(s).

During the assessment, the assessor and client work together to develop a support plan that promotes a wellness approach and reflects the client's needs, goals and service preferences. The support plan forms part of the client record that can be viewed by clients via the My Aged Care client portal. Assessors and service providers who have received a referral for assessment or service can also view the support plan via the My Aged Care assessor or provider portals.

4.4.1 Home support assessment

From July 2015, the RAS will use the NSAF to conduct face-to-face home support assessments for clients seeking access to CHSP services. Following a home support assessment, a client may be:

- Referred for CHSP services
- Referred for a comprehensive assessment (conducted by an ACAT)
- Provided with information only.

4.4.2 Comprehensive assessment

The ACATs will continue to conduct face-to-face comprehensive assessments. The assessment builds on information provided by clients during screening (and home support assessment, where applicable), to determine a client's eligibility for care types under the Act, with approval subject to a decision by an ACAT Delegate.

Following Delegate approval, a client may be

- Referred for HCP, Residential Care (including respite) or TCP services; or
- Referred to CHSP services.

A client can also be referred to other aged care services such as MPS, or National Aboriginal and Torres Strait Islander Flexible Care Programme, or provided with information.

Case Study: Assessment

Background

Ioannis and Elizabeth are an older couple who have been caring for each other for quite some time. Elizabeth has a long-term back injury that confines her to a wheelchair and requires multiple medications. Ioannis helps Elizabeth get in and out of her wheelchair, he bathes her and drives her to doctor's appointments. Their daughter Ros helps with household chores, but she has a full time job and young children to care for. Recently Ioannis has been having some difficulties lifting Elizabeth so she sometimes spends the whole day in bed and is developing pressure areas. The stress of caring for his wife is beginning to affect Ioannis' mood, and he sometimes has difficulty remembering which medications to give Elizabeth. He knows that he needs help but he does not know where to start.

Contacting My Aged Care

Ros notices that her father is beginning to struggle with his caring responsibilities, and spends some time on the My Aged Care website to find out what support may be available for her parents. She reads about the various levels of support and helps her parents call the My Aged Care contact centre.

Registration and screening

After registration, Ioannis and Elizabeth undergo screening over the telephone. During screening, some initial information is collected to determine their needs and options for support. In discussing these options, Ioannis and Elizabeth agree that a Comprehensive Assessment would be of benefit to them both.

Referral for Comprehensive Assessment

The contact centre staff member sends referrals for both Ioannis and Elizabeth to the local ACAT, who accept the referrals and assigns an assessor to undertake the assessments. The assessor contacts Ioannis and Elizabeth and arranges for both assessments to be undertaken together in their home.

Undertaking the assessment

When attending the home, the assessor informs Ioannis and Elizabeth about the assessment and Delegation process, gains their consent to proceed and asks them to sign an Application Form. Following this, and building on the information provided during screening, the assessor uses the NSAF and supplementary tools to collect and record information from Ioannis, Elizabeth, Ros and their GP. Following the development of individual support plans which identify their goals and strategies to meet these goals, the assessor makes a recommendation that they both receive a Home Care Package level 3-4, and that Residential Respite for Elizabeth is appropriate.

The information the assessor collects, including the support plan is then sent to a Delegate who formalises the assessor's recommendations, and approves Ioannis for a Home Care Package level 3-4, and Elizabeth for a Home Care Package level 3-4 and Residential Respite. Ioannis and Elizabeth receive notification of this decision via post and the assessor also contacts them to discuss their options for referral to providers who can provide the services they have been approved for.

4.5 Referral for service methods

My Aged Care contact centre staff, the RAS, and ACATs will work with clients to select preferred service provider(s), choose a referral method and issue referrals for service(s). My Aged Care contact centre staff and assessors must obtain consent from the client or their Authorised Representative for a referral to be issued to a service provider.

The referral process will be supported by the enhanced service finders on the My Aged Care website. This information will also be used by contact centre staff and assessors to refer clients for service(s). The most relevant search results will be displayed first. Relevance is determined by factors such as services searched for and availability. The results will be returned in a random order (i.e. the results will not be returned in alphabetical order).



It is critically important that information about the services you provide is kept up to date. The information is publicly displayed on the service finders on the My Aged Care website (myagedcare.gov.au), and is used by contact centre staff and assessors to ensure accurate referrals to service(s).

There are three methods for sending referrals to service. The methods are:

- An electronic referral in order of client preference: the assessor sends a referral to the first preferred service provider. If the first preferred provider rejects the referral, a referral will be automatically sent by the My Aged Care system to the next preferred provider until the list of providers has been exhausted. If all providers reject the referral, a notification will be raised to alert either contact centre staff or the assessor
- An electronic referral broadcast to all service providers: a referral is issued to all preferred providers simultaneously. The first provider to accept the referral will be able to view client contact details, and contact the client to arrange services. On acceptance of the referral, the My Aged Care system will automatically withdraw the referral from other providers
- A referral code which the client can provide to a preferred service provider: the assessor generates a referral code and provides it to the client. It is expected that clients seeking to access Residential Care services are likely to choose to use a referral code which allows them to self-manage their referral by visiting preferred providers. The referral code allows the service provider to access the client's record to assist discussions and, where the client and provider wish to proceed, for the provider to accept the referral in the My Aged Care provider portal.



The referral for service will not indicate whether the provider is the first preferred provider, or whether the referral was broadcast to multiple providers.



Referral codes are generated for services. If a client requires multiple services, they will be given a referral code for each service.

Case Study: Referral for service methods

Background

Ioannis and Elizabeth have been assessed together and have both been approved for Home Care Package level 3-4. Elizabeth has also been approved for Residential Respite. The Assessor has contacted Ioannis and Elizabeth to organise referrals to be sent in line with the support plan.

Referral for service(s)

After their approval, the assessor works with Ioannis and Elizabeth to search for, and refer to, providers in their region. As they need a Home Care Package right away and have expressed no preference of receiving a Home Care Package from a particular provider, the assessor focuses the search on available Home Care Package providers, and sends a broadcast referral to those providers. If they have services available, a provider will accept the referral, and other service providers will no longer be able to view the referral. In this scenario, services will commence straight away.

If there are no packages available, service providers can accept Ioannis or Elizabeth to their waitlist. The assessor, in seeing that Ioannis or Elizabeth will be on a waitlist, may organise some interim CHSP services to ensure their needs are being met until the time a package becomes available and Ioannis or Elizabeth are removed by a provider from the waitlist.

As Elizabeth does not need Residential Respite right away, Ioannis and Elizabeth choose to spend more time researching aged care homes that meet their requirements. As Ioannis feels comfortable with using the internet, the assessor helps familiarise him with the service finder on the My Aged Care website to find aged care homes that provide Residential Respite in their region, as well as narrow the search to focus on service providers that have services for older Greek people. The assessor provides Ioannis with a referral code for Elizabeth that allows the chosen provider to access Elizabeth's record and commence providing services. Alternatively, the assessor could conduct this search via the assessor portal, and provide Ioannis and Elizabeth with a list of services that can meet their needs and that they may wish to visit.

Outcome

Both Ioannis and Elizabeth are provided with a Home Care Package after a period of time on a waitlist. After selecting an aged care home that can provide Residential Respite, Ioannis contacts the service provider and gives them Elizabeth's referral code.

The service provider enters this code via the 'Retrieve referral code' option available on the provider portal which gives them access to Elizabeth's client record. The provider then accepts the referral from their 'Incoming referrals' list.

If Ioannis and Elizabeth's needs change, such as if they require permanent Residential Care, a new assessment may be undertaken. This can be at the request of a client or a service provider.

5 Provider portal overview

Administrator

Team Leader

Staff Member

This information is relevant for people performing Administrator, Team Leader or Staff Member roles in the provider portal.

The provider portal is used to:

- Manage information about the services you provide
- Manage referrals for service(s) issued by My Aged Care contact centre staff or assessors by accepting, rejecting, or placing on a waitlist
- Update client records with information about services being delivered
- Request that an assessor undertakes a new assessment of the client
- Generate reports.



Staff must have an individual AUSKey linked to their organisation to access the provider portal. For more information, visit <https://abr.gov.au/AUSkey/>.

5.1 Roles and functions in the provider portal

Service provider staff can be allocated a number of roles (Administrator, Team Leader or Staff Member) within the provider portal. To view different outlets in the provider portal, select the outlet name in the top right hand corner.

The first Administrator to log in to the provider portal may choose to assign more Administrator roles to other staff to help them to set up and maintain information about their organisation in the portal. Administrator roles can be assigned at an organisation level, or for sections of the organisation (known as outlets in the portal).

People assigned an Administrator role at an organisation level will manage information for the entire organisation in the portal. People assigned an Administrator role for one or more outlet(s) in the organisation will only be able to manage information for the outlet(s) they have been assigned.



The role(s) assigned to staff will apply to them across all outlets to which they have been assigned.

The table below outlines the functions for each role within the provider portal.

Table Four: Key functions for each role in the provider portal

	Key Functions	Roles		
		Administrator	Team Leader	Staff Member
Client Focussed	Search for a client record		✓	✓
	View client records		✓	✓
	View referrals		✓	✓
	Accept and reject referrals		✓	
	View tasks and notifications	✓	✓	✓
	View My Aged Care interactions	✓	✓	✓
	Add client service information		✓	✓
Organisation Focussed	Request change to contractual information	✓		
	Manage outlets: add, edit, activate, deactivate	✓		
	Manage services: add, edit, activate, deactivate	✓		
	Manage staff accounts: add, edit, deactivate	✓		

5.1.1 Administrator functions

People assigned the Administrator role in the provider portal are responsible for managing outlet(s), managing information about the services the organisation delivers, and managing staff accounts. For more information about the Administrator role, see Section 6.

5.1.2 Team Leader functions

People assigned the Team Leader role in the provider portal have the same functions as the Staff Member role and are also responsible for managing referrals for service(s). For more information about the Team Leader role, see Sections 7 and 9.

5.1.3 Staff Member functions

People assigned the Staff Member role in the provider portal are responsible for adding and updating client service information in the client record. For more information about the Staff Member role, see Section 9.

5.2 Tasks and notifications

The provider portal includes a tasks and notifications feature to inform and prompt action. An email alert will also be received for tasks and notifications.

Service providers may need to complete actions as a result of tasks or notifications, and My Aged Care contact centre staff and assessors may contact service providers to discuss why action has not been taken in response to tasks, and some notifications.

Table Five: Tasks in the provider portal

Task	Purpose of task
Client's name has changed	To prompt the next organisation that sees the client next to perform a wallet check
Wallet check has been unsuccessful	To prompt the next organisation that sees the client next to perform a wallet check
Referral to waitlist has not been actioned	To prompt service provider to action referral to waitlist

Table Six: Administration notifications in the provider portal

Notification	Purpose of notification
A new staff member has been created by the Organisation Administrator	Informs Organisation Administrators about the creation of a new staff member in the provider portal (useful if the organisation has multiple Organisation Administrators)
Service inventory item or service-sub type item has been updated	To inform service providers that a service inventory item or service sub-type item has been updated by My Aged Care contact centre staff on behalf of the service provider
Organisation Administrator updates roles of a staff member	To inform service providers that their role in the provider portal has changed
Change of service delivery location	To inform service providers that their request to change information about their organisation has been processed by the Department and updated in the provider portal and service finder
New service type has been added (via NAPS)	To inform service providers that a new service type has been added, and the service set up steps can now be completed
Funded service item has been inactivated	To inform service providers that a service provided by your organisation is not funded anymore and has been inactivated

Table Seven: Client management notifications in the provider portal

Notification	Purpose of notification
Change to client identity (first name, last name, preferred name or home address)	To enable service providers to update their records outside the provider portal
Referral has been recalled	To inform service providers that a referral has been recalled
A client record has been deactivated	To inform service providers that a client record has been deactivated, and a service cessation date needs to be entered
A reminder that a client record has been deactivated	To remind service providers that a client record has been deactivated, and a service cessation date needs to be entered
Referral for service has been received	To inform service providers that a referral for service has been received
Referral to waitlist has been received	To inform service providers that a referral to waitlist has been received
A reminder that a referral for waitlist has not been actioned	To remind service providers that a referral to waitlist has not been actioned
Referral to waitlist has been recalled (by an assessor or My Aged Care contact centre staff)	To inform service providers that a referral to waitlist has been recalled
Referral to waitlist has been recalled (by the system due to another service provider providing the service)	To inform service providers that a referral to waitlist has been recalled

5.3 Reports and forms

The reports available in the provider portal will assist service providers to understand their organisation’s workload. The forms in the provider portal will assist providers to understand client needs, and apply for care in emergency cases. The reports and forms are outlined below.

Table Eight: Reports available in the provider portal

Report	Purpose of report
Service Provider Workload Management	This report outlines the services that an outlet has been asked to provide and the place in which they are being asked to provide them.
NSAF Report	This is a printable form of a (referred) client’s completed NSAF.

Table Nine: Forms available in the provider portal

Form	Purpose of form
Application for care	This is a printable form version of an Application for Care under the <i>Aged Care Act 1997</i> . This form is to be completed by a client however allows for service providers to complete the form in emergency cases.

5.4 My Aged Care interactions

A list of My Aged Care interactions that service providers have had with My Aged Care contact centre staff is available in the My Aged Care provider portal. Types of interactions include calls, emails and service inventory updates.

6 Administrator role

Administrator

This function is undertaken by staff who have the 'Administrator' role in the provider portal. Outlets can only be created by staff with the Administrator role at an organisation level, not by staff with the Administrator role at an outlet level.

The first person from your organisation to log in to the provider portal will be responsible for assigning roles to other staff. This will be the person who was nominated on the My Aged Care Organisation Administrator Registration Form. This person will have an Administrator role in the portal.

6.1 Setting up outlets in the provider portal

The provider portal has been designed to allow service providers to set up their organisation in a way that suits their business model, particularly their referral management model.

An outlet is a way of grouping information in the provider portal about the services your organisation delivers to a particular service delivery area. Administrators will need to set up 'Outlets' in the provider portal before they can add their organisation's service information (service items and service sub-types).

Information about the services your organisation delivers will be displayed via the service finders on the My Aged Care website. This will allow people to locate individual services based on the service delivery area or the service delivery location that you nominate for each service.

Electronic referrals (for service and waitlist) will be received from contact centre staff and assessors for services within outlet(s). Referrals are managed by people assigned the Team Leader role for the outlet.

You can choose to set up your organisation as one outlet in the provider portal, so all referrals for service(s) will be managed by the people you have assigned the Team Leader role. If you deliver services in multiple locations, or if you deliver services under a number of different programmes, you may choose to set up a number of outlets in the provider portal to segment your workforce. This will segment the referrals for service that the people assigned the Team Leader role in the portal will manage (i.e. a Team Leader associated with an outlet for CHSP services will not manage referrals for a separate outlet for HCP or Residential Care services).

6.2 Examples of how to set up outlets in the provider portal

The models below explore some fictional scenarios, which may help Organisation Administrators decide how to set up outlets in the provider portal.

6.2.1 Decentralised referral management model

Case Study: Company AAA Scenario

Company AAA provide personal care, domestic assistance, home maintenance and home modification services in the north Queensland region. They have:

- an office in Cairns where the personal care and Occupational Therapy teams are based; and
- a mobile van-based team who provide cleaning and maintenance services.

The teams have managers who also perform the services. Sally, the company's nominated Organisation Administrator, has decided that the managers will manage their respective service referrals (accept/reject/waitlist) as well as continuing to deliver services. Sally sets up outlets for each team in the provider portal and assigns the team managers with Team Leader roles for their respective outlets.

Once Sally has set up the service items within the outlets, from 1 July 2015, the service finders on the My Aged Care website display company AAA's available services, and the My Aged Care contact centre and assessors can refer clients to the organisation.

The service referrals are managed by the appropriate Team Leader who works with their team to deliver the requested services to the clients.

6.2.2 Centralised referral management model

Case Study: Company BBB Scenario

Company BBB provide personal care, domestic assistance, home maintenance and home modification services in three delivery areas in NSW. They have:

- two regional offices where the personal care and Occupational Therapy teams are based; and
- a mobile van-based team who provide cleaning and maintenance services.

As a result of an increase in regional demand and resulting increased workforce, BBB appointed a central intake team who are responsible for accepting all referrals for service(s) and have the required knowledge to assign it to the appropriate delivery teams.

John, BBB's nominated Organisation Administrator, sets up outlets for each delivery team in the provider portal, and assigns the members of the central intake team with Team Leader roles for their outlets.

Once John has set up the service delivery items within the outlets, from 1 July 2015, the My Aged Care system displays BBB's available services in the service finders and the My Aged Care contact centre and assessors can refer clients to BBB.

The central intake team members work together to manage all of the service referrals received and ensure that the requested services are delivered to the clients.

6.2.3 Hybrid referral management model

Case Study: Company CCC Scenario

Company CCC runs Rosella House, a residential aged care facility in South Australia. They have:

- staff who provide Residential Care services; and
- a nursing team on site who also provide mobile personal care services.

The home has a Managing Director who is supported by an assistant, and there is a Head of Nursing who reports to the Managing Director.

Aled, the Managing Director's assistant and the company's nominated Organisation Administrator, decides to set up two outlets:

- a Rosella House outlet, that will provide Residential Care services; and
- a Nursing outlet, that provides personal care services to the service delivery area.

Aled assigns the Head of Nursing to the Team Leader role for the Nursing Outlet, and assigns himself and the Managing Director to the Team Leader roles of the Rosella House outlet.

Once Aled has set up the service delivery items within the outlets, the My Aged Care system displays company CCC's available services in the service finders and the My Aged Care contact centre and assessors can refer clients to the company.

The Managing Director can manage the Residential Care referrals. The personal care referrals are managed by the Head of Nursing, and the requested services are delivered to the clients.

6.3 Setting up services

You will need to create and maintain information about the aged care services that your organisation provides. Referrals will be received from My Aged Care contact centre staff and assessors for services within outlet(s). Referrals are managed by one or more people who are allocated the Team Leader role for the outlet.

You can add both Commonwealth and non-Commonwealth funded services. These services are known as 'Service Items' in the provider portal. Services need to be linked to one of your outlets.

You can also add service sub-types under your service items. Service sub-types are automatically populated when service items are added to your outlet.

Information about the areas you deliver Commonwealth-funded services in (referred to as 'service delivery areas' in the portal) will be pre-populated, based on your contractual information. All service providers (except Residential Care) will need to review their service delivery area information and edit if required.

The information you add about the services you deliver will be publicly displayed on the service finders on the My Aged Care website from 1 July 2015.

Residential Care providers will be able to add promotional material, including photos. Promotional material will be sent to the Department for review. It is expected that the review will take three business days. When approved, the promotional material will be displayed on the service finders on the My Aged Care website.



It is critically important that information about the services you provide is kept up to date. This information is publicly displayed on the service finders on the My Aged Care website (myagedcare.gov.au), and is used by contact centre staff and assessors to enable accurate referrals to service(s).

When you set up a service item, it will default to 'inactive' in the provider portal. You will need to change the status to 'operational' before it is displayed on the service finders via the My Aged Care website.



You will need to maintain availability information for your services.

Availability information will be displayed on the service finders via the My Aged Care website. You will also be able to maintain a waitlist. To receive referrals to waitlist ensure that the 'waitlist availability' for the specific service is 'on'. When you change availability information, it will take approximately an hour to display the updated information on the service finders.

6.4 Setting up staff and assigning roles

After you have created outlets for your organisation, you will create staff accounts in the provider portal. You will need to assign roles (Administrator, Team Leader, Staff Member) to your staff, and assign your staff to one or more outlets.

Administrators will need to consider the different functions that the roles in the provider portal perform and determine which role(s) to assign to your organisation's staff.

See the table and descriptions in Section 5.1 for more information about the key functions that people with different roles will perform in the provider portal.

Case Study: Assigning Administrator roles in the portal

Alice works for a large organisation that delivers Home Care Packages and has three residential care facilities in different regions in New South Wales. Alice was nominated to be the first person in her organisation to log in to the provider portal on the My Aged Care Organisation Administrator Registration Form.

Alice has ensured that she has an Administrator AUSKey. Alice also recognises that all staff who will use the provider portal will need an individual AUSKey, so she submits a list of staff for her organisation requiring an AUSKey to the Australian Business Register (for more information about how to register for AUSKeys, see <https://abr.gov.au/AUSKey/>).

Alice and the management team decide that they want to set up each service that the organisation delivers from different regions as a different outlet in the provider portal. They also decide that a different person will be responsible for managing information about the services the organisation delivers in the portal for each outlet.

Alice logs in to the portal and assigns an Administrator role to Ben for one outlet (a residential care facility). This means that Ben will perform the functions of an Administrator in the portal for that outlet. He will be responsible for managing information about services and staff accounts for that outlet.

Ben is an administration officer for the organisation. Alice decides to also assign Ben the Team Leader role. This means that in addition to his Administrator functions in the portal, Ben will be responsible for managing referrals for the outlet he is assigned to.

When Ben logs in to the provider portal using his AUSKey, his homepage will display the icons associated with the Administrator and Team Leader roles.

7 Team Leader role

Team Leader

This function is undertaken by service providers who have the 'Team Leader' role in the provider portal. Team Leaders need to manage referrals within three calendar days.

Team Leaders can accept, reject or waitlist referrals through the provider portal. If staff with the Team Leader role are assigned to more than one outlet, they can manage referrals for each of the outlets they are assigned to.

In addition to managing referrals, a person assigned the Team Leader role in the provider portal will have the same functions as a Staff Member role in the provider portal. See Section 9 for more information about the Staff Member functions.

7.1 Managing referrals for service and referrals to waitlist

Referrals for service and referrals to waitlist will be for individual services. Service providers will either receive referrals for service electronically or via a referral code, depending on the client's preferences. Referrals to waitlist will only be sent electronically. The information contained in a client record will vary depending on the interaction the client has had with My Aged Care:

- If the client has been referred directly to CHSP service or directly to a waitlist from the My Aged Care contact centre, the client record will include information collected at screening, and an action plan (see Section 4.3 for more information about what is included in an action plan)
- If the client has been referred for service or referred for waitlist by a RAS or ACAT, the client record will generally include an action plan, as well as a support plan and more detailed information collected during the home support or comprehensive assessment (see Section 4.4 for more information about what is included in a support plan).

Team Leaders will be able to view all information in the client record except the client's full address and phone number (see Section 4.2 for more information about what is included on a client record). This will ensure that clients are not contacted by multiple providers seeking additional information prior to accepting a referral. After the referral has been accepted, the service provider who has accepted the referral can see the full client record. Referrals will include a priority status (low, medium, high), as explained in Section 8 below.

From 1 July 2015, Team Leaders will receive an email when a referral is received by their outlet. This email will be sent to the email address associated with the outlet. This notification will prompt the Team Leader to action the new referral, but will not contain any information about the referral. The Team Leader will need to log in to the provider portal to manage the referral.

7.1.1 Accepting referrals for service

Team Leaders will need to manage referrals for service received via the My Aged Care provider portal, and referral codes provided to them by clients.



When you 'retrieve a referral code' via the provider portal, you do not automatically accept the referral for service(s). Retrieving the referral code moves the client's referral into the incoming referrals list, so that you can view client details (except their full address and phone number). You need the client's consent to accept the referral.

After the Team Leader accepts a referral for service, the referral will be listed in the 'Accepted services pending' tab in the provider portal. The Team Leader will need to work with staff in the organisation to arrange service delivery.

Service providers are expected to continue to comply with programme guidelines regarding service delivery.

7.1.2 Rejecting referrals for service

If a Team Leader rejects the referral, they must select a reason for rejecting the referral. This information will inform future aged care service planning.



If a provider needs to reject a referral after they have accepted it, they will need to call the My Aged Care contact centre.

7.1.3 Accepting referrals to waitlist and drawing clients into service

Team Leaders will need to manage referrals to waitlist received via the My Aged Care provider portal.

After the Team Leader accepts a referral to waitlist, the referral will be listed in the 'Waitlist' tab in the provider portal.

Once services become available, the Team Leader can select a client from the 'Waitlist' tab and then select 'Draw down into service'. The client will then be visible in the 'Accepted service pending' tab.



Clients may be on a number of waitlists at any one time. If a service becomes available, and the client is 'Drawn down into service' by a provider, the client will be removed from all other waitlists.

7.1.4 Rejecting referrals to waitlist

If a Team Leader rejects the referral to waitlist from the 'Incoming referral' tab or the 'Waitlist' tab, they must select a reason for rejecting the referral. This information will inform future aged care service planning.

8 Understanding priority status for referrals for service

Team Leader

This information is relevant for people performing Staff Member or Team Leader roles in the provider portal.

Staff member

As a result of the answers given during the screening or assessment process, a priority for assessment or for service delivery will be generated. The priority rating is based on a client's level of function, the level of risk in relation to the care situation, and any other concerns that are relevant to the client's presentation. It is the role of the contact centre staff or assessor to agree with or change the recommendation based on the client's need. It is also the role of contact centre staff and assessors to set client expectations about when services may commence. The priority statuses indicate expected timeframes for:

- Managing the referral
- Commencing services
- Updating service information within the client record.



The priority status does not change existing emergency provisions.

The timeframes for commencing services and updating service information start after acceptance of the referral, or after a client is 'Drawn down into service' from a waitlist.

The priority status outlines service expectations to guide prioritisation, and assist with managing client expectations. The Department expects that service providers will work well within these timeframes. The priority timeframes (for managing referrals, commencing services, and updating the client record) will be closely monitored, but not enforced (at this stage). My Aged Care contact centre staff and assessors may follow up on actions not completed within the timeframes.

8.1 Priority status for Commonwealth Home Support Programme services

The three priority statuses for completing actions for CHSP providers are outlined below. The timeframes for commencing services differ depending on the priority status.

Table Ten: Priority Status for CHSP providers

Priority status	Required action and timeframe		
	Manage referrals (accept, reject, waitlist)	Commence services	Update service delivery information in client record
High	3 calendar days	2 calendar days after accepted	14 calendar days after accepted
Medium	3 calendar days	5 calendar days after accepted	14 calendar days after accepted
Low	3 calendar days	10 calendar days after accepted	14 calendar days after accepted

8.2 Priority status for Home Care Packages, Residential and Transition Care Program services

The three priority statuses for completing actions for HCP / Residential / TCP service providers are outlined below. The timeframes for commencing services differ depending on the priority status.

Table Eleven: Priority Status for HCP, Residential and TCP Services

Priority status	Required action and timeframe		
	Manage referrals (accept, reject, waitlist)	Commence services	Update service delivery information in client record
High	3 calendar days	2 calendar days after accepted	14 calendar days after accepted
Medium	3 calendar days	14 calendar days after accepted	14 calendar days after accepted
Low	3 calendar days	28 calendar days after accepted	14 calendar days after accepted

9 Staff Member and Team Leader role

Team Leader	This information is relevant for people performing Staff Member or Team Leader roles in the provider portal.
Staff member	

A person who is assigned the Staff Member and Team Leader role in the provider portal will be responsible for adding and updating client service information in the client record.

 If service providers are directly approached by new clients seeking Commonwealth funded aged care services, service providers should refer clients to My Aged Care.

In cases where urgent care is required, service delivery may be provided before a client has contacted My Aged Care. Ultimately clients need to be registered with My Aged Care, and have their broader needs considered.

Service providers can assist clients with the My Aged Care registration process by:

- Recording client details in an inbound referral form (accessed from myagedcare.gov.au) that is sent to the My Aged Care contact centre
- Calling the My Aged Care contact centre with the person to facilitate registration and screening
- Sending a fax with information about the person.

9.1 Commencing services and updating the client record

After the person with the Team Leader role in the provider portal accepts a referral for service, the client needs to be contacted to discuss service delivery details.

Service providers are expected to commence services and update the client record to record service commencement date and frequency within the timeframes outlined in Section 8. If services cease, service providers need to record a service end date.

Service providers are expected to continue to comply with programme guidelines regarding service delivery, and they will still need to undertake existing care planning processes (i.e. developing care plans).

Service providers will be able to add notes and observations about a client via the provider portal. Service providers can choose to use this feature to record notes about a client, but this is not mandatory. These notes will be visible to My Aged Care contact centre staff, assessors, and other service providers delivering services to that client.



All notes and observations will be subject to Freedom of Information legislation.

9.2 Reviewing services being delivered to a client

When a client's needs or circumstances have changed significantly, a service provider can request a review or a new assessment of the client's needs.

9.2.1 Review

A review is an evaluation of a client's support plan undertaken by the RAS. A review can be requested by the client, service provider, or scheduled by the RAS. The review may result in a change in services, or a further assessment.

To request a review, service providers should contact the RAS (via phone) who undertook the initial assessment. A review by a RAS assessor occurs over the phone. If the review indicates that the client's aged care needs have not changed significantly, the RAS assessor will adjust the support plan and make referrals for other services (if required).

If a client has been referred directly to CHSP services after screening (by the contact centre), a request for a review should be made to the contact centre.

The outcomes of the review may include:

- Identification of, and referral to, additional services
- Extension of existing services
- Recommended cessation of services
- Referral for a new home support assessment or a comprehensive assessment.

9.2.1.1 Recommended reviews

My Aged Care contact centre staff or RAS assessors may recommend a review date on the client's action or support plan. The RAS who undertook the initial assessment will conduct the review.

Service providers have an ongoing responsibility to monitor the services they provide their clients to ensure that the client's needs are being met. It is expected that service providers will continue to undertake reviews in line with relevant programme guidelines.

9.3 New assessment

If there is a significant change in the client's needs and/or circumstances, a new assessment can be requested from a RAS assessor or an ACAT assessor. The new assessment can be requested by a client, service provider, or after a review has been undertaken by the RAS.

10 Privacy requirements

	Administrator	Team Leader	Staff member
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This information is relevant for people performing Staff Member, Team Leader or Administrator roles in the provider portal.

Service provider organisations are required to comply with the legislative requirements under the *Privacy Act 1988* (Privacy Act), including the Australian Privacy Principles. The Privacy Act regulates the handling of personal information about individuals, including the collection, use, storage and disclosure of personal information, and access to and correction of that information.

11 Complaints

Administrator

Team Leader

Staff member

This information is relevant for people performing Staff Member, Team Leader or Administrator roles in the provider portal.

11.1 Complaints about My Aged Care

A complaint is a formal expression of dissatisfaction or unmet expectation provided orally or in writing about the service, action and/or behaviour of a representative of My Aged Care, which warrants a response.

Complaints can be made about the services of:

- My Aged Care contact centre
- My Aged Care website and related website tools
- Portal functions including the provider portal, assessor portal, and client portal
- My Aged Care Regional Assessment Service.

There are several entry points for people or advocates to make complaints about My Aged Care services. These entry points include the:

- My Aged Care contact centre
- My Aged Care website
- My Aged Care Regional Assessment Service providers
- Commonwealth Ombudsman.

Complaints will be managed in the first instance by the My Aged Care contact centre or RAS (where the complaint is about the assessment process or assessment outcomes).

The complaint will be escalated to the Department if no mutual resolution of the issue can be reached, or if the complainant wants to pursue the matter further.

The My Aged Care contact centre and RAS, along with other entry points, will provide regular reports to the Department about complaints received.

11.2 Other complaints

The My Aged Care contact centre may receive complaints about other issues that are not complaints about My Aged Care, such as complaints about:

- Quality of care or service(s) being delivered to people receiving Commonwealth funded aged care services
- Assessment services provided under the Aged Care Assessment Programme (ACAP)
- Services being delivered under state-based HACC programs (Victoria and Western Australia).

In these situations, My Aged Care contact centre staff will refer the complainant to the appropriate area to make the complaint. For example, for a complaint against a service provider, the complainant would be encouraged to raise any issues with the organisation/service provider in the first instance, or where necessary, with the Aged Care Complaints Scheme.

Feedback or comments from stakeholders and users about My Aged Care are not categorised as complaints. These will be viewed as service improvement opportunities.