3. Quick Reference Guide
Managing referrals for assessment and support plan reviews

Referrals for assessment from My Aged Care are managed by the person(s) assigned the Team Leader role in the assessor portal. Team Leaders can accept, reject, assign, un-assign and reassign referrals to individual assessors. Team Leaders can also transfer incoming and accepted (but not yet commenced) referrals to other assessment organisations. Before accepting referrals, Team Leaders can change the priority of assessment referrals.

Viewing assessment referrals and client information
As a Team Leader, to view assessment referrals for clients assigned to your outlet, follow the steps below.

1. Select ‘Referrals’ from the home page.

Alternatively, select ‘Assessment referrals’ from the tool bar at the top left hand corner of the portal.
You will see a warning notification at the top of the ‘Referrals’ page if there are referrals that have not been actioned within the priority timeframes.

You can select to view referrals in a card or list view by selecting the card or list icon. Your selection will be retained the next time you log in to the portal.
2. In the card view, referrals can be filtered or sorted by last name, first name or Aged Care User ID etc. Use 'Advanced Search' to add filters such as suburb, date referred, assessment type and priority.

3. You can view more information on the referred client including client notes and assessment history by selecting the arrow on the top right hand corner of the client card, then selecting 'View full client record' from the expanded card view. The client record will be displayed.

When viewing a read-only Screening or Assessment, Team Leaders will be able to navigate back to the previous page they were on through the link (breadcrumb) at the top of the page.
If you want to view the information available in the client record you can either select 'Back' on your internet browser to return to the 'Incoming referral' page, or choose the 'Assessment referrals' option from the tool bar.

The same referral and client information is available in List view, and more information can be viewed by selecting the arrow to the left of the client’s name.
Accepting assessment referrals and changing the priority

Once a Team Leader has viewed the client record they can accept or reject the referral. Follow the steps below to accept a referral, and change the priority of a referral if required.

1. Select 'Accept' from the expanded card or list view.

   Team Leaders can bulk-accept assessment referrals by selecting the tick box next to each client they would like to accept, or by using 'Select all' for all client referrals assigned to their outlet. Team Leaders will be unable to change the priority when bulk-accepting referrals.

   For ACATs bulk-accept will default assessment setting to “non-hospital”. Team leaders can then change the setting to “hospital” as required.

2. A pop up box will open. Confirm that the priority of the assessment referral is correct and select the assessment setting. To change the assessment priority, choose from the options provided in the drop down.
Assessors are able to indicate the assessment setting before starting the assessment. As part of the new Aged Care Assessment Program contract, ACAT Key Performance Indicators will take into account the setting in which the interaction with the client takes place, namely community setting or hospital setting. The ‘Assessment setting’ populated here must match the value recorded in the assessment. Assessors must ensure that both fields are manually updated to reflect the same value where one is changed.
Team Leaders can add a triage category when accepting a referral if their outlet uses additional internal prioritisation.

3. If Team Leaders change the assessment priority, they will need to select a reason from the drop-down list and add a description for the change in the free text box.

Accept this referral for Robert Sirak

All fields marked with an asterisk (*) are required

<table>
<thead>
<tr>
<th>Change assessment priority?</th>
<th>Medium</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reason for changing priority</td>
<td></td>
</tr>
<tr>
<td>Reason description:*</td>
<td></td>
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</table>

If a Team Leader changes the assessment priority, the new priority timeframe calculation will be applied to that referral. Note: the timeframe is calculated from the date the referral was issued, not the date the priority was changed.

Assigning an assessment referral to an assessor
As a Team Leader, follow the steps below to accept and assign a referral to an assessor.

1. Select 'Accept' from the expanded card or list view.
2. Select an assessor and then select ‘Assign’.
3. The assessment referral will appear in the Team Leader’s ‘Accepted referrals’ list, under the name of the assessor the referral was assigned to.

Follow the steps below to accept the referral and assign an assessor later:

1. Select ‘Accept’ from the client’s referral, in expanded list or card view.
2. Select ‘accept and assign assessor later’.

3. The referral will appear in the ‘Accepted referrals’ tab, under ‘Unassigned’. This list can be sorted by assessor name and ‘Unassigned’.
4. To assign an ‘Unassigned’ client assessment, open the client’s referral in the expanded card or list view, and select ‘Assign’.

5. Select the assessor and then select 'Assign'.

The referral will appear in the ‘Accepted referrals’ tab, under the name of the assessor the referral was assigned to. The referral will also appear in the assigned assessor’s ‘Current work’ tab for action.
Unassigning or reassigning an assessment referral

Team Leaders can unassign an assessment referral and reassign the referral to another assessor in the same outlet. There is no limit on the number of times you can unassign or reassign a referral.

1. From the ‘Accepted referrals’ tab, access the expanded referral view by selecting the arrow on the Client card.

2. Select ‘Reassign’. If using list view, select ‘Reassign’ from the expanded view.
3. Select 'Reassign' and select another assessor and save, or select ‘Unassign’. The ‘Triage category’ is an optional field.

If reassigned, the assessment referral will appear under the relevant assessor in the list of Accepted Referrals.

If unassigned, the referral will appear under 'Unassigned' in the list of Accepted Referrals.
Entering First Intervention of a Clinical Nature

Team Leaders can add details relating to First Intervention of a Clinical Nature to Accepted Referrals, prior to an Assessor starting the assessment.

1. On an accepted referral (card or list view), select ‘First Intervention of a Clinical Nature’.

2. A pop-up modal will display, enabling a Team Leader to enter the following information relating to the first intervention of a clinical nature:
   - Date (current date or prior date)
   - Timing of first intervention of a clinical nature
     - Prior to assessment; or
     - At assessment
   - Outcome of first intervention of a clinical nature (mandatory if first intervention of a clinical nature is prior to assessment).

The information entered by Team Leaders will be available to the assessor to verify or change prior to starting the assessment.
Transferring an assessment referral to another outlet or organisation
To transfer assessment referrals to an alternative assessment organisation or outlet follow the steps below.

- Only incoming referrals or accepted referrals that have not been commenced may be transferred. A referral can only be transferred to another organisation or outlet once.

1. On the ‘Incoming referrals’ tab, select the arrow next to the client name and then select ‘Transfer’ in the expanded view.

**Card view:**

![Card view of client profile]

- **List view:**

![List view of client profile]

It is not mandatory for a Team Leader to enter information relating to first intervention of a clinical nature.
2. In the pop-up box the type of assessment required must be selected from a drop down list; either Home Support or Comprehensive.

Before transferring a referral, the Team Leader must ensure that:

- The client understands why their referral is being transferred and consents to the transfer of the referral to the new assessment organisation
- They have contacted the assessment organisation that will receive the client referral to confirm that they will accept the referral.

Do not transfer a referral before you obtain confirmation that it will be accepted by the receiving assessment organisation. This ensures that the client does not experience any delay in receiving an assessment.

3. Search for the alternative assessment organisation by postcode or name and then select ‘Search’
4. Select the appropriate assessment organisation for referral transfer and then select the reason from the drop-down menu. Reasons include: outside of region, insufficient capacity, change in client circumstance or other.

5. In the comments box, provide as much detail as possible about the reason for transferring the referral to assist the receiving organisation and then select ‘Transfer’

6. After selecting ‘Transfer’, the referral will be transferred to the selected assessment outlet and a notification will be displayed at the bottom of the ‘Referrals’ or ‘Accepted referrals’ page.
Rejecting an assessment referral
If an outlet is unable to accept an assessment referral and cannot transfer it, a Team Leader can reject the referral by following the steps below.

Referrals may also be rejected after acceptance, but not after the assessment has commenced.

1. Select 'Reject' on the expanded card view of the referral information.

2. Enter a reason for rejecting the assessment referral and then select 'Reject'.

The rejected referral will automatically be sent back to My Aged Care to action.
Rejecting an assessment with the reason of ‘Client deceased’ will change the client’s status to ‘Deceased’ and make the client record read only. Any unaccepted service referrals will be recalled and the client’s access to the client portal will be revoked.

**Important:** Where a client is active in the national queue or has been assigned a Home Care Package, this will remove the client from the national queue and withdraw any assigned Home Care Packages.
**Viewing and managing support plan reviews**

Team leaders are able to manage support plan reviews via the ‘Reviews’ tile on the assessor portal home page.

In the ‘Manage Upcoming Reviews’ section, Team leaders can view Upcoming reviews, Assigned reviews and Review history.

In the ‘**Upcoming reviews**’ tab Team leaders can:
- View scheduled reviews
- View reviews requested by service providers
- Assign reviews to assessors
- Cancel reviews.

In the ‘**Assigned reviews**’ tab Team leaders can:
- Reassign reviews to different assessors

In the ‘**Review history**’ tab Team leaders can:
- View a history of completed and cancelled reviews
Viewing support plan reviews
A support plan review request will contain the following information:

- Person/organisation requesting the support plan review
- Assessor who last conducted the assessment
- Reasons for request including:
  - Client's change in circumstances
  - How the change has affected the client's need for services

Support plan review requests submitted by a Service Provider will also include a Primary reason for request:
Team leaders are able to sort and filter support plan reviews by category:

Assigning, reassigning and cancelling support plan reviews

**Assigning a support plan review**
To assign a support plan review, follow the steps below.

1. Navigate to the ‘Upcoming reviews’ tab and select ‘Assign review’ on the expanded client card.
2. Choose an assessor to assign the support plan review to and select ‘Assign’.

Once assigned, a banner will appear on the bottom of your screen:

You have successfully assigned this review to the assessor.

The support plan review will now appear in the ‘Assigned reviews’ tab.

Assigned reviews will also appear in the ‘Current work’ tab of the assessor the review was assigned to.
Reassigning or unassigning a support plan review

To reassign or unassign a review, follow the steps below.

1. From the ‘Assigned reviews’ tab, select ‘Reassign review’ on the support plan review to be reassigned or unassigned.

2. Select another assessor or ‘Unassign’.

The support plan review will now be reassigned to the selected assessor and the review will appear in their ‘Current work’ tab.

⚠️ Unassigned support plan reviews will return to the ‘Upcoming reviews’ tab.
Cancelling a support plan review
To cancel a review, follow the steps below.

1. In the ‘Upcoming reviews’ tab, select ‘Cancel review’ from the expanded view of the client card for the review to be cancelled.

2. Enter a reason for the cancellation and select ‘Cancel review’

The review will be removed from the ‘Upcoming reviews’ tab.

⚠️ Completed and cancelled support plan reviews will also appear in the ‘Recent work’ tab of the assessor who completed the review.

⚠️ Cancelling a support plan review with the reason of ‘Client deceased’ will change the client’s status to ‘Deceased’ and make the client record read only. Any unaccepted service referrals will be recalled and the client’s access to the client portal will be revoked.

**Important:** Where a client is active in the national queue or has been assigned a Home Care Package, this will remove the client from the national queue and withdraw any assigned Home Care Packages.
Support Plan Reviews will also be cancelled automatically where a new assessment referral is issued and accepted for the client. This will allow the new assessment to commence without requiring the support plan review to be completed.