This Quick Reference Guide has been designed to inform those who perform the role of ‘Administrator’ within the My Aged Care provider portal (the provider portal) of the procedures for creating and maintaining information about service delivery outlets.

Information about aged care services provided by each service provider (provider), including some information about non-Commonwealth funded aged care services, is publicly displayed in the service finder on the My Aged Care website. This information is also used by My Aged Care contact centre staff and assessors to refer clients for service(s).

Please note:

- It is critically important that service information is maintained by providers (providers) to ensure appropriate referrals are sent to providers.
- Only staff assigned the role of Organisation Administrator in the provider portal can create outlets. Staff can then be assigned to outlets and service delivery information can be added for each outlet.
- Only staff assigned the role of Organisation Administrator or Outlet Administrator can add or update service information.
- An outlet identifies the location or area from which service providers deliver a specific service(s). Each outlet can have different staff, service information, locations and contact details.
- You will need to set up one or more outlets in the provider portal to add and maintain information about the services your organisation delivers.
- To ensure that your services will be displayed on the service finder, you must set up an active outlet with an address and a service item under an operational outlet.
**How do I view outlets?**

To view outlets, follow the procedure below.

1. Select 'Outlet administration' from the home page.

You can now view all of the outlets for your organisation.

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If you are assigned the role of Staff Member or Team Leader only, your home page will not display the 'Outlet administration' tile.

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For further information, go to My Aged Care

How do I create or add a new outlet?

Administrators need to set up outlets in the provider portal before service information can be added.

⚠️ When you create an outlet, the status is set to ‘Inactive’ by default. You must activate the outlet and create service items in an outlet before it can be made operational.

1. From the Outlet administration page, select 'Add new outlet'.

2. Enter outlet details. To add an outlet address, select 'Add outlet address'.
3. Fill out your address details, Select 'Validate this address'.

4. Confirm that the address is displayed correctly, then select 'Save address'.

⚠️ If the address has been entered correctly but is not returned as a result, select 'Not found use entered address anyway'.

For further information, go to My Aged Care
5. Complete the remaining fields. Select 'Create outlet' in order to save the record and create the outlet.

The outlet has now been created and the details for the outlet have been saved. Repeat this process for remaining outlets, if required.

⚠️ When you create an outlet, the status is set to 'Inactive' by default. You must have service items added to an outlet before it can be activated. The process for activating an outlet is described on page 23 of this quick reference guide.
**How do I edit the Organisation philosophy?**

Organisation philosophy attributes are designed to support the changes for Home Care Package providers, and will be shown in the service finder results for Home Care Packages. Further information on Home Care Packages can be found at [https://agedcare.health.gov.au/increasing-choice-in-home-care](https://agedcare.health.gov.au/increasing-choice-in-home-care) on the Department’s website. If you are not funded for Home Care Packages you will not need to set these attributes.

1. Add/edit cultural specialisations.

Click ‘Edit’ next to ‘Cultural specialisations’ to select those groups that you have a focus on providing culturally specific care to.

You can choose to apply this to all current Home Care services in your organisation by using the ‘Save and apply to all Outlets’ option, or save as a default for all new services added by using the ‘Save and don’t apply to all Outlets’ option.
If you see an error message stating that ‘Maximum Exit Amount’ is a mandatory value, then you will need to set this up before proceeding. Please see section 2.1.3 below for details on how to do this.

How do I set the maximum exit amount?

Maximum exit amount is a new feature designed to support the changes for Home Care Package providers. Further information on Home Care Packages can be found at [https://agedcare.health.gov.au/increasing-choice-in-home-care](https://agedcare.health.gov.au/increasing-choice-in-home-care) on the Department’s website. If you are not funded for Home Care Packages you will not need to set this up.

The maximum exit amount refers to the sum that a provider may include in a home care agreement and deduct from any unspent funds upon a client ceasing care with them. This is set at the organisation level and inherited by all outlets that provide Home Care Package services. A Home Care Package provider must enter an amount even if it is not charged.
(enter $0 if not charged).

1. Setting up for the first time.
2. If you are required to set a maximum exit amount for your Home Care Package services and have not yet done so, you will have an option to enter an amount by selecting 'Enter maximum exit amount (for home care package services)' just below the ‘Organisation philosophy’ attributes.

3. Edit maximum exit amount.
   If you have previously set an amount, you will have the option to edit this amount under ‘Home Care Package’ by selecting ‘Edit’ next to the existing ‘Maximum exit amount’.

For further information, go to My Aged Care
4. Save new amount.
Enter the new about and select ‘Save and apply to all Outlets’ to save the new amount.

What are Home Care Package attributes?
If you are configuring a Home Care Package service, a number of attributes specific to the delivery of this service type will become available to select and display on the service finder. These are shown as follows.

1. Special needs group.
To select specific special needs groups that customised services may be offered for, select the relevant check boxes in the ‘Special needs group’ section.

2. Specialised services.
To indicate if this service has a focus on providing access to specific specialised services, you can mark them in the ‘Specialised services’ section.
3. Languages.
To indicate if this service caters for specific language requirements, select the languages in the ‘Languages’ section. Select ‘Edit’ to bring up the selection and select ‘Save’ to save the configuration.

4. Hours of operation.
You can outline standard hours of operation for this service. By default you can enter specific Monday to Friday, Saturday and Sunday hours. You can also specify individual working days by using the ‘Customise’ option.
You can also specify whether a service is offered out of standard hours of operation, whether a surcharge applies and what the average surcharge is.

5. Service Pricing.
If you offer the option for consumers to self-manage services, and a pricing schedule for your services, use the ‘Service Pricing’ section to indicate the average percentage of home care package funds that remain for services after provider fees have been taken into account.
Pricing schedules will be applicable for all Home Care Package services in the outlet that the individual service resides.

Once submitted, the information will be reviewed and approved by the Department. It is expected that it will take three business days for the review to be completed. When approved, the promotional material will be displayed on the Home Care Packages finder via the My Aged Care website.
How do I add service items to an outlet?

1. From the Outlet administration page, select the name of the outlet on the outlet card that you want to add a service item to.

   ![Outlet administration page]

   The 'View outlet' page will be displayed.

2. From the 'View outlet' page, select 'Add a service item'.

   ![View outlet page]

For further information, go to My Aged Care
3. Select 'Funded' or 'Non-funded' for the service item you are adding.

![Add service item](image)

"Funded" refers to government subsidised services that are funded and approved by the Australian Government under a Commonwealth aged care programme.

"Non-funded" services are privately funded and costs for delivering the service are not subsidised by the Australian Government.

For Home Care Package services this option will not be available as all services must be Commonwealth government subsidised.

To add funded services, proceed to **step 4**. To add non-funded services, proceed to **step 5**.

4. For funded services, select the service you want to add to your outlet by selecting the relevant service item and then select 'Save'. You can refine the list of service items by entering details and using the 'Filter' function.
If you are adding a new Home Care Package service, you will be required to enter a unique name for the service in the ‘Service Item Name’ field that is displayed.

5. For non-funded services, enter service information (by completing the fields) and select ‘Save’.

The service item will now display in the Outlet details page under ‘Services’.

The service item will be defaulted to ‘Inactive’ and the status will need to be changed to ‘Operational’ before it is displayed on the public service finder. The process for activating a service item is described on page 22 of this guide.
How do I edit a service item?

You are able to edit service details by selecting ‘Edit’ to the right of the service item you wish to amend, including service item name, service delivery area, enter if a service caters for diverse needs, upload promotional attachments and enter a detailed description for the service item.

How do I add service sub-types to service items?

1. Navigate to the ‘View Outlet’ details from the ‘Outlet administration’ page for the outlet that you want to add a service sub-type to.

2. Select the blue arrow next to the service to see expanded service details and then select ‘Add service subtype’.

The ‘Service Subtype’ page will be displayed.

3. Select the sub-type you want to add to the service, and select ‘Save’.

For further information, go to My Aged Care
The service sub-type will be added to the service item. It will also be displayed in the service finder.

**How do I remove a service sub-type?**

1. Navigate to the ‘View Outlet’ details from the ‘Outlet administration’ page for the outlet that you want to remove a service sub-type from.
2. Expand the service item, and select ‘Remove’ next to the service sub-type you want to remove.
3. In the ‘Removal confirmation’ box, select ‘Confirm’ to remove the service sub-type from the service item.
The service sub-type will be removed, and information about the service sub-type will not display in the service finder.

**How do I add a room type to a residential facility?**

1. Navigate to the ‘View Outlet’ details from the ‘Outlet administration’ page for the outlet that you want to add room information to.

2. Select the blue arrow next to the service to see expanded service details and select 'Add room type'.

3. Enter the required information in the ‘General room information’ and ‘Pricing information’ fields.
4. Enter the required information in the ‘Key feature statement’ fields. Select ‘Save’ after all required information has been entered.

Fields marked with an asterisk (*) are mandatory.
5. Select 'Submit' next to the room type.

This room information will display on the service finder once approved by the Department (allow 3 business days).

If you save the room type but do not select ‘Submit’, you will be notified that there are room types requiring approval by the Department and be prompted to submit the room type to the Department prior to displaying on the public service finder.
**How do I activate / deactivate a service item?**

1. Navigate to the ‘View Outlet’ details from the ‘Outlet administration’ page for the outlet with the service item that you want to activate/deactivate.

2. For the services that have been added to the outlet, select ‘Operational’ to activate the service item or ‘Inactive’ to deactivate the service item under the ‘Status’ heading.

⚠️ Only ‘Operational’ services will display in the service finders.
How do I activate an outlet?

After service items are added, outlet(s) need to be made active so that the following occurs:

- The service items display in the service finder.
- Contact centre staff and assessors can send electronic referrals to the appropriate outlet.

1. Navigate to the ‘View Outlet’ details from the ‘Outlet administration’ page for the outlet that you want to activate, and select ‘Activate outlet’.

A warning message will display

2. Select 'Activate outlet' to confirm that you wish for this information to be displayed in the service finder.
Your outlet is now active and operational service item information will display in the service finder, and will display as ‘Active’ in the provider portal.

Assessors can only match and refer to active services.

**How do I deactivate an outlet?**

To remove an outlet from the service finders and stop referrals being sent to the outlet, it must be deactivated.

1. Navigate to the ‘View Outlet’ details from the ‘Outlet administration’ page for the outlet that you want to deactivate.
2. Select 'Deactivate outlet' to confirm that you wish to deactivate the outlet.

![Deactivate outlet]

The outlet is now inactive, does not display on the relevant service finder or receive referrals, and it displays as ‘Inactive’ in the provider portal.

⚠️ An outlet cannot be made inactive if there are accepted and commenced services.

**How do I remove an outlet from the provider portal?**

To remove an outlet from the provider portal, it must be in the status of ‘Inactive’.

1. Navigate to the ‘View Outlet’ details from the ‘Outlet administration’ page for the inactive outlet you wish to remove, and select “Remove outlet”.

![View outlet]

For further information, go to My Aged Care
2. Select ‘Remove outlet’ to confirm you wish to remove the outlet.

![Remove outlet](image)

The outlet will be no longer display in the provider portal.

⚠️ If you want to create an outlet with the same name as the one you removed, you will need to call the My Aged Care service provider and assessor helpline on 1800 836 799.

**How do I maintain availability of services and waitlists for that service?**

You can maintain information about the availability of service items via the provider portal.

1. Navigate to the ‘View Outlet’ details from the ‘Outlet administration’ page for the outlet that you want to edit service availability and waitlist information.

![View outlet](image)
2. Scroll down to ‘Services’ and select the relevant service/waitlist availability status (yes / no).

The waitlist functionality is explained in the *Quick Reference Guide - Managing referrals for service.*

⚠️ Service and waitlist availability information will be displayed on the service finder via the My Aged Care website. When you change availability information, it can take approximately an hour to display the updated information on the service finders.

**For more information or support**

Further information is available from the *My Aged Care Provider Portal User Guides.* The My Aged Care service provider and assessor helpline is available on 1800 836 799.