Conducting a Review of a Client’s Support Plan

PURPOSE
This factsheet provides information on the updated Support Plan Review function in My Aged Care.

THE INTENT OF THESE CHANGES
This functionality provides assessors with the ability to conduct review(s) of a client’s Support Plan from within the Assessor Portal. This change will allow assessors to review and, where appropriate, to amend a client’s Support Plan. If necessary, assessors will also be able to initiate a new assessment for a client following the review. This enables assessors to ensure that a client’s needs continue to be met through the services and strategies identified in the Support Plan.

WHAT IS A REVIEW?
A review by an assessor relates to the effectiveness and appropriateness of the client’s Support plan. An assessor may set a review date of the Support plan at the time of the assessment. A review may also be requested by a client or a service provider. It may be completed over-the-phone with the client.

A review by an assessor will look at the following aspects:

- The reason a review has been requested and its impact on the client’s existing assessment information and Support Plan
- The appropriateness of the services in meeting the client’s goals
- Any new goals for the client, and associated referral(s) for service
- The appropriateness of setting another review date or an end date for service delivery.
The outcome of a review by an assessor may be no change or an increase or decrease in services. Where the results of a review by an assessor affects the current delivery of services to the client, the assessor is to contact the service provider and discuss the results of the review and the recommendations as it relates to the delivery of the service.

Where changes to the Support Plan no longer reflect the outcomes of the assessment, a new assessment is to be undertaken.

**MANAGING CLIENTS DUE FOR A SCHEDULED REVIEW**

Team leaders are able to manage clients due for a scheduled review by accessing the ‘Reviews’ tile on the Assessor Portal home page. This replaces the previously available report functionality.
Team leaders are able to view Upcoming Reviews, Assigned Reviews and Review history.

In ‘Upcoming reviews’ team leaders are able to view scheduled reviews and assign reviews to an assessor. Team leaders can also cancel scheduled reviews that have not yet started, providing a reason for cancelling the review.
In ‘Assigned reviews’ team leaders are able to reassign reviews to different assessors.

Note: Assigned reviews will also appear in the ‘Current work’ tab of the assessor the review was assigned to.

In ‘Review history’ team leaders are able to view a history of completed and cancelled reviews.

Note: Completed and cancelled reviews will also appear in the ‘Recent work’ tab of the assessor who completed the review.
HOW TO UNDERTAKE A REVIEW IN THE ASSESSOR PORTAL

1. Where an assessor is assigned to undertake a scheduled review, assessors will be able to action the Support Plan review from their ‘Current work’ queue in the ‘Assessments tab.

2. An assessor is also able to initiate a review from within the client record, by selecting ‘Start support plan review’.

![Diagram showing how to undertake a review in the assessor portal.](Image)
‘Start support plan review’ will display:

- For the assessor that created the original Support Plan or for an assessor that is associated to the same outlet as the original assessor
- If there is no active assessment referral for the client; and
- If there is no assessment currently in progress; and
- If the existing Support Plan has been finalised.

**Hint:** Only Assessors from the organisation that conducted the original assessment will be able to conduct a review.

3. An assessor will be prompted to record the reason for Support Plan review (mandatory).

An assessor will be able to make changes to information in the following sections of the client’s Support Plan:

- Assessment summary
- Client motivations
- Goals & recommendations
- Manage services & referrals
- Associated People
- Review
Hint: During a review of the client’s Support Plan, Comprehensive Assessors cannot make recommendations that require delegate approval. This will require the assessor to initiate a new assessment.

4. An assessor is to record the outcome of the Support Plan Review when selecting ‘Complete & finalise support plan review’. After selecting ‘Complete & finalise support plan review’ no further changes can be made to the Support Plan as part of the review.

Hint: A client can have multiple reviews of their Support plan. Assessors should consider whether the client requires a new copy of the Support plan as a result of a review.
5. A client’s review history will display in the client record on the ‘Plans’ tab. The previous Note that was created with the date and outcome of the Support Plan review will no longer be generated.

INITIATING NEW ASSESSMENT

Where there is a significant change in a client’s needs or circumstances which affect the objectives or scope of the existing Support Plan, a new assessment may be undertaken. A new assessment can be requested by a client, or following a review by a service provider or assessor.

1. An assessor can initiate a new assessment for the client by selecting ‘request assessment’.
2. Assessors will be required to select who they would like to assign the referral for assessment to – themselves, their organisation or another assessment organisation. Assessors will be required to select a priority for the new assessment, the reason for referring and select ‘Refer assessment’.

Hint: An assessor can refer the client to another assessment organisation of the same or different assessment type. For example, where a client has previously had a Home Support Assessment and as a result of the Support Plan review it is evident that their needs have increased significantly and cannot continue to be met by Commonwealth Home Support, the Home Support Assessor can refer the client for Comprehensive Assessment.
3. The new assessment will appear in the organisation’s ‘Referrals’ queue for the Team Leader to accept.