Quick Reference Guide - Create service delivery outlets and add service information using the My Aged Care provider portal

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

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

Please note:

- It is critically important that service information is maintained by 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.

For further detail about structuring outlets, please refer to the My Aged Care Guidance for Providers document.
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.

**Note:** If you are assigned the role of Staff Member or Team Leader, your home page will not display this option.
How do I create / add a new outlet?

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

**Note:** 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'.

For further information, go to My Aged Care
1800 200 422 | www.myagedcare.gov.au
3. Fill out your address details, then select 'Validate this address'.

![Add address form]

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

![Confirm the address]

**Note:** If the address has been entered correctly but is not returned as a result, select 'Not found' use entered address anyway.
5. Complete the remaining fields. Select 'Create outlet'.

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

**Note:** 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 later in this quick reference guide.
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.

The 'View outlet' page will be displayed.

2. From the 'View outlet' page, select 'Add a service item'. 
3. Select 'Funded' or 'Non-funded' for the service item you are adding.

′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.

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.
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’.

**Note:** 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 finders. The process for activating a service item is described later in 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.

![View outlet]

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

![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'.

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.

A 'Removal confirmation' box will be displayed.

3. 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 finders.
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’.

The 'Room Type' page will be displayed.
3. Enter the required information in the 'General room information' and 'Pricing information' fields.

Note: Fields marked with an asterisk (*) are mandatory.

4. Enter the required information in the 'Key feature statement' fields. Select ‘Save’ after all required information has been entered.

Note: Fields marked with an asterisk (*) are mandatory.
5. You will be notified that there are room types pending approval by the Department and be prompted to submit the room type to the Department for approval prior to displaying on the public service finder.

6. Select 'Submit' next to the room type.

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

![View Outlet](image1)

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.

![Service Item Status](image2)

*Note:* 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 finders.
- 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 be displayed.

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 now be displayed in the service finder, and will display as ‘Active’ in the provider portal.

**Note:** 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.

   ![View Outlet](image)

   A warning message is displayed.
2. Select ‘Deactivate outlet’ to confirm that you wish to deactivate the outlet.

Your outlet is now inactive. The outlet will no longer display on the relevant service finder(s) and referrals will not be sent to it, and it will display as ‘Inactive’ in the provider portal.

**Note:** 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”.

A warning message will be displayed.
2. Select ‘Remove outlet’ to confirm you wish to remove the outlet.

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

**Note:** 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.
2. Scroll down to ‘Services’ and select the relevant service/waitlist availability status (yes / no).

Note: Service and waitlist availability information will be displayed on the service finders 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.

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

For more information or support

Further information is available from the My Aged Care Guidance for Providers document and the My Aged Care Provider Portal User Guide: Part One. The latest versions of both documents are available from Department of Health website.

The My Aged Care service provider and assessor helpline is available by calling 1800 836 799.