Aged Care Assessment Services (ACAS) full transition to My Aged Care – Implications and Actions for Service Providers

February 2016

Context
From 7 March 2016, Victorian Aged Care Assessment Services (ACAS) will begin using the full functionality of My Aged Care.

This bulletin contains important information for:
- Residential aged care providers and
- Home Care Package providers

These providers will need to be ready for this change in advance of the 7 March 2016 transition date in order to view client information, receive electronic referrals or confirm referral codes.

Attached to this bulletin is a series of checklists to guide providers through the process of:
- correctly activating the My Aged Care provider portal account
- registering clients with My Aged Care
- managing incoming referrals from ACAS via My Aged Care
- commencing services and updating service information in a client’s My Aged Care client record.

HACC providers are scheduled to transition to My Aged Care on 1 June 2016. Further information about this transition will be made available when these arrangements have been finalised.

My Aged Care set-up and information accuracy
From 7 March 2016, ACAS will use My Aged Care both to find information about available services and to send electronic referrals to service providers.

Failing to correctly set-up and activate services and outlets in the My Aged Care provider portal will result in services not being visible on the My Aged Care service finders and may also prevent providers from receiving electronic referrals sent via My Aged Care.

In addition to correct set-up, it is critical that providers check the accuracy of their service information within My Aged Care and regularly update and maintain this information. This includes ensuring information accurately reflects:
- types of services delivered
- availability of these services
- waitlist availability
- locations services are delivered from
- areas of service delivery
Client registration with My Aged Care

From 7 March 2016, people seeking access to residential aged care and home care packages will need to contact the My Aged Care contact centre to discuss their aged care needs and have a client record created.

If a residential, home care package or transition care provider is approached directly by a new client (i.e. without an existing approval for aged care services), they will need to refer the client to the My Aged Care contact centre for a discussion about the client’s needs and for registration.

Providers can support the client to contact and be registered with My Aged Care by:

- providing the My Aged Care contact centre details
- completing an inbound referral via the My Aged Care website
- calling My Aged Care with the client or
- sending My Aged Care information about the client via fax.

Following discussion and registration with the contact centre, the contact centre will issue referrals for assessment. Following an ACAS assessment, the client may nominate to return to the service provider who assisted them to contact My Aged Care or nominate another preferred provider.

Where urgent care is required, services may be delivered to the client prior to contacting My Aged Care. However, all clients will eventually need to be registered with My Aged Care.

Referral methods

During an assessment, an ACAS assessor will work with clients to identify their preferred service provider(s). These decisions will be supported by information available on the My Aged Care service finders – reinforcing the importance of providers keeping this information up to date and accurate.

A referral for service(s) can be issued to a provider in one of three ways:

- Electronic referral via My Aged Care in order of a client’s preferences: The ACAS will populate a list of providers into My Aged Care, in order of client preference. My Aged Care will then send 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 service provider until the list of providers has been exhausted. If all providers reject a referral, a notification will be raised to alert contact centre staff and the assessor.

- Electronic referral broadcast to all service providers: This allows the ACAS assessor to issue a referral to all preferred providers simultaneously. The first provider to accept the referral will be able to view the clients contact details, and contact the client directly to arrange services. Once a provider accepts the referral, the My Aged Care System will automatically withdraw the referral from other providers.

1 Note: My Aged Care contact centre may send a referral directly to a provider if, during the registration process, it becomes apparent that the client has an existing approval for aged care services. If a residential aged care, home care package or transition care provider accepts a referral from the contact centre, they will need to use current processes to view the Aged Care Client Record to ensure the client has the appropriate approval for the service.
• **A referral code which the client can provide to a service provider:** In some instances, particularly for residential aged care, a client may wish visit a number of providers before determining their preferred provider. In this circumstance, ACAS will use My Aged Care to generate a referral code and provide this to the client. The referral code will allow service providers to access the client's record, assisting discussion about client needs and preferences. Where the client and provider wish to proceed, the provider can use the referral code to accept the referral via the My Aged Care provider portal.

**Referral priority status**

Incoming referrals will include a priority status attached to them - high, medium or low. The timeframes for commencing services differ depending on this status. A table of priority status, required actions and timeframes is included below:

<table>
<thead>
<tr>
<th>Priority Status</th>
<th>Manage referrals (accept, reject, waitlist)</th>
<th>Commence services</th>
<th>Update service delivery information</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>3 calendar days</td>
<td>2 calendar days after accepted</td>
<td>14 calendar day after accepted</td>
</tr>
<tr>
<td>Medium</td>
<td>3 calendar days</td>
<td>14 calendar days after accepted</td>
<td>14 calendar days after accepted</td>
</tr>
<tr>
<td>Low</td>
<td>3 calendar days</td>
<td>28 calendar days after accepted</td>
<td>14 calendar days after accepted</td>
</tr>
</tbody>
</table>

**Client record**

*From 7 March 2016, an Aged Care Client Record (ACCR) will no longer be produced for a client.*

This will be replaced by a My Aged Care client record. It is necessary that all staff members (clinical and administrative) who need to see referral information, view the ACAS approval or enter information in the client record have a My Aged Care staff account.

**Updating the client record with service delivery information**

After accepting a referral, service providers will be required to update service delivery information on the client record via the provider portal. Service delivery information that must be captured in the client record includes:

- service start date
- frequency of the service
- planned review of services
- service type
- if services cease, a service end date

Providers will also be required to update client information via the provider portal following any changes to the services being delivered to a client.

It is possible for providers to add notes and observations to the My Aged Care client record. These may be entered into relevant text fields within a My Aged Care client record or uploaded as electronic documents. This is not mandatory. Providers should be aware that clients or their representative can view screening and assessment information and notes through the MyGov portal.
Notes and observations added to the client record are visible to contact centre staff, assessors and subject to Freedom of Information legislation.

**During service delivery, providers must continue to comply with existing program guidelines and undertake existing care planning processes (i.e. develop care plans).**

**Requesting a reassessment**

When a client’s needs or circumstances have changed significantly, the provider will need to request a new assessment of a client’s needs via the My Aged Care provider portal.

Providers should note that an ACAS or ACAT approval is valid nationally. This means that no reassessment is required for a person with a valid approval even if this was issued interstate.

Providers should also be aware that approvals for permanent residential care do not lapse. No reassessment for permanent residential care is required if the client has a current approval for permanent residential care - unless it is specifically time limited.

**Further Information, please contact:**

<table>
<thead>
<tr>
<th>Sam Ferrier</th>
<th>Nina Bowes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aged Care Project Officer</td>
<td>Manager, Aged Care</td>
</tr>
<tr>
<td><a href="mailto:sam.ferrier@vha.org.au">sam.ferrier@vha.org.au</a></td>
<td><a href="mailto:nina.bowes@vha.org.au">nina.bowes@vha.org.au</a></td>
</tr>
<tr>
<td>(03) 9094 7777</td>
<td>(03) 9094 7777</td>
</tr>
</tbody>
</table>
Checklist: correctly activating your My Aged Care provider portal account

All residential, home care package and flexible care providers will need to have completed all the below steps in advance of 7 March 2016.

The following steps will need to be undertaken by the person within your organisations assigned to the ‘Administrator’ role in the My Aged Care provider portal. For more information about this and other roles within the provider portal, refer Provider Portal User Guide – Part One, Section 1.7.

If providers have not undertaken all of these steps, they will not receive accurate and timely referrals to their service post 7 March 2016.

### First steps - Checklist

1. □ Obtained an AUSkey and logged-in to the My Aged Care provider portal for the first time.  
   Refer to the Provider Portal User Guide – Part One, Attachment A

2. □ Created service delivery outlets. Refer to the Provider Portal User Guide – Part One, Section 2.1

3. □ Created and assigned service items to outlet(s). Refer to the Provider Portal User Guide – Part One, Section 2.2.1

4. □ Made services operational. Refer to the Provider Portal User Guide – Part One, Section 2.2.5

5. □ Created staff accounts. Refer Provider Portal User Guide – Part One, Section 2.7

6. □ Assigned staff roles **and** assigned staff to outlet(s). Refer to Provider Portal User Guide – Part One, Section 2.7.2

7. □ Activated service outlets

   Refer to Provider Portal User Guide – Part One, Section 2.3.1

8. □ Set service delivery availability (provider Portal User Guide – Part One, Section 2.4)

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2 Note: providers **must** activate service outlets otherwise information will **NOT** show on the service finders.
Checklist: registering clients with My Aged Care

From 7 March 2016, all clients without an existing approval for aged care services must be referred to the My Aged Care contact centre for an initial discussion of needs and registration.

Providers can refer clients to the My Aged Care contact centre using the options below:

<table>
<thead>
<tr>
<th>Registering a client with My Aged Care - Checklist</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Provide the client contact information for the My Age Care contact centre³</td>
</tr>
<tr>
<td>☐ Record client details in an inbound referral form (myagedcare.gov.au/referral)</td>
</tr>
<tr>
<td>☐ Call the My Aged Care contact centre with the client (1800 200 422)</td>
</tr>
<tr>
<td>☐ Send a fax with information about the person (1800 728 174)</td>
</tr>
</tbody>
</table>

**Note:** where urgent care is required, services may be delivered to the client prior to contacting My Aged Care. However, all clients will eventually need to be registered with My Aged Care.

³ Note: a range of consumer booklets, brochures and printed materials with information on My Aged Care can be viewed and ordered here.
Checklist: managing incoming referrals

Form 7 March 2016, clients will be referred to Residential Care, Home Care Packages and Transition Care providers by:

- electronic referral via My Aged Care; or
- a referral code that the client will present to the provider

Providers will be required to undertake the following steps to view, accept, reject or waitlist incoming referrals.

These steps will need to be undertaken by the person or people within your organisations assigned to the ‘Team Leader’ role in the My Aged Care provider portal. For more information about this role in My Aged Care, refer to Provider Portal User Guide – Part Two, Section 1.7.

**These steps must be undertaken within three calendar days**.

### Managing incoming referrals – Checklist

- View incoming referral details via the provider portal. Refer Provider Portal User Guide – Part Two, Section 2.3

- For clients presenting with a My Aged Care referral code – access and view the client record via the provider portal. Refer Provider portal User Guide – Part Two – Section 2.2

- Accept the referral. Refer Provider Portal User Guide – Part Two, Section 2.4

  OR

- Reject the referral. Refer Provider Portal User Guide – Part Two, Section 2.5

  OR

- Waitlist the referral. Refer Provider Portal User Guide – Part Two, Section 2.6

**Note**: for broadcast referrals (i.e. referrals sent to multiple providers): Once a provider accepts a referral, the referral will be withdrawn from all other providers.
Checklist: commencing services and updating the client record

After accepting a referral for services via the My Aged Care provider portal, providers will be required to commence service delivery and enter service delivery information into the My Aged Care client record.

The following steps will need to be undertaken by the person or people within your organisation assigned to the ‘Team Leader’ or ‘Staff Member’ roles in the My Aged Care provider portal. For more information about these roles in My Aged Care, refer to Provider Portal User Guide – Part Two, Section 1.7.

Referrals will include a priority status. Services must commence within:
- 2 calendar days after referral is accepted for a HIGH priority status
- 14 calendar days after accepted for a MEDIUM priority status
- 28 calendar days after accepted for a LOW priority status

Service delivery information must be entered into the My Aged Care client record via the provider portal within 14 calendar days after the referral has been accepted.

Commencing service and adding/maintaining service delivery information- Checklist

- Contact the client to discuss service delivery details.
- Complete client identify verification, if required⁵. Refer Provider Portal User Guide – Part Two, Section 3.3
- Add service delivery information. Refer Provider Portal User Guide – Part Two, Section 3.4
- Update and maintain service delivery information. Refer Provider Portal User Guide – Part Two, Section 3.5
- Add notes and observations. Refer Provider Portal User Guide – Part Two, Section 3.6

⁵ Note: it is expected that whoever has first contact with the client face-to-face (i.e. an assessor or service provider) will sight client identification and record this information on the client record. As the majority of clients will have received an assessment, it is unlikely a provider will be required to undertake this step.