Navigating the My Aged Care client portal as a representative

If you have been added as a representative (Regular or Authorised) for a client in My Aged Care, you can access their client record using the My Aged Care client portal.

> ⚠️ To access the My Aged Care client portal, you will first need a representative record to be created. This can be done by calling the My Aged Care contact centre on 1800 200 422. You must provide the email address that you use to access myGov. Follow the steps in [Accessing the My Aged Care Client Portal](#) to access the client portal.

What is the client portal used for?

The client portal is the key tool representatives can use to view aged care services for clients that they represent. You can use the portal to:

- View a summary of a client's interactions with My Aged Care
- View and update a client's personal details
- View and update a client's relationships including representatives and primary contact person
- View a client's current support plans
- View a client's current care approvals
- View the aged care services a client is currently receiving
- View a client's interactions with My Aged Care
- View and upload attachments
- View and print client information e.g. Referral Code letter or client record PDF.
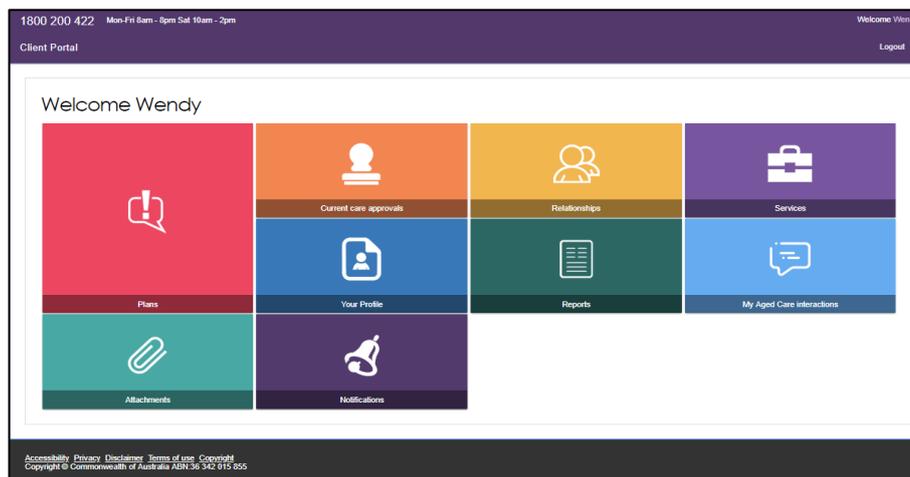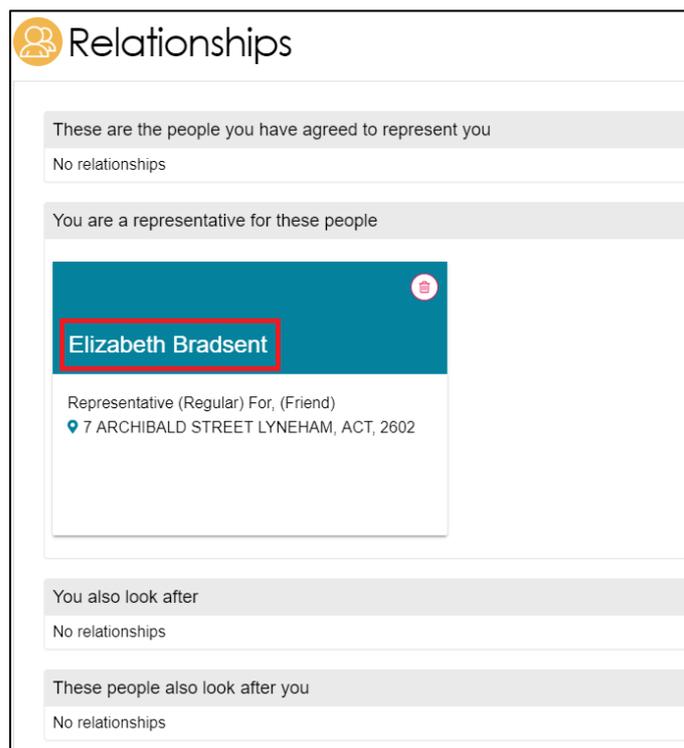
How do I view clients that I represent?

To view clients (one or multiple) that you represent, select the 'Relationships' tile from your home page.
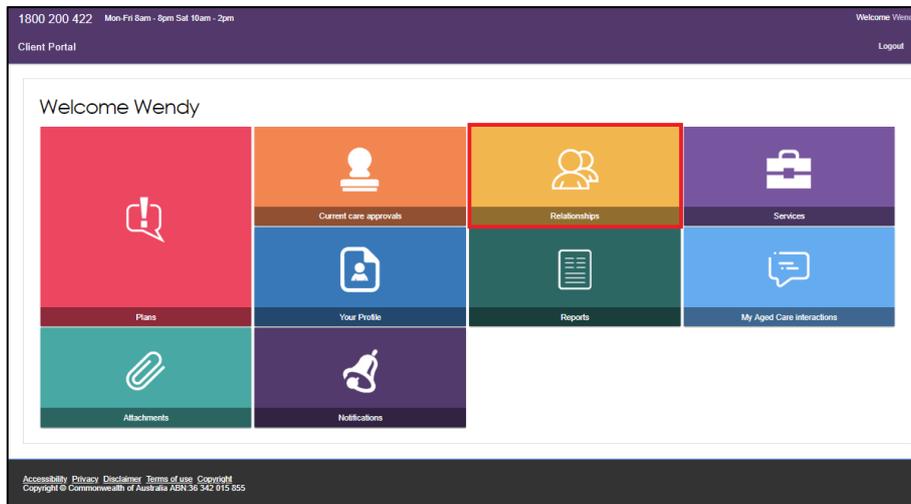
Any clients that you represent and other relationships you have with other people (e.g. emergency contact) will be displayed.

Select the name of the client that you wish to view. The client's record will be displayed as shown below.
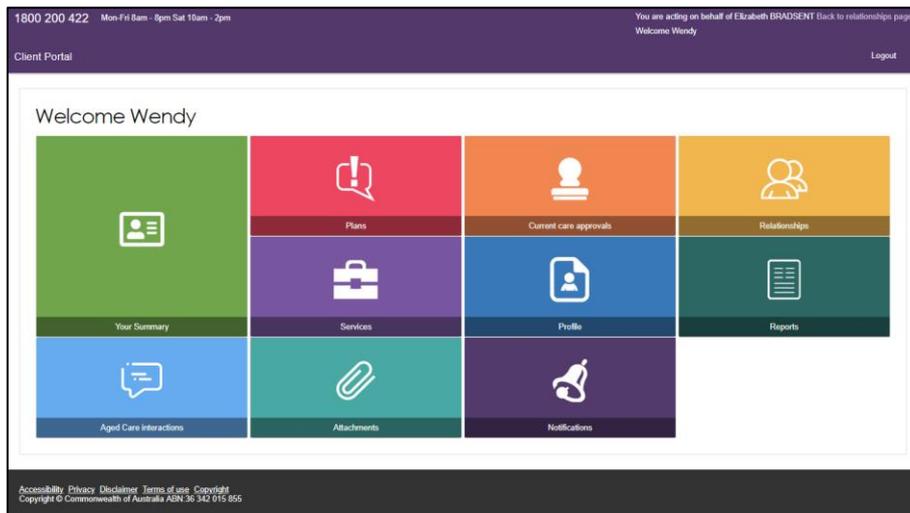
As a representative you can access the following functions from the client portal homepage, by clicking on each of the tiles above.

1. The "Your Summary" function displays key information about the client's interactions with My Aged Care and summarises the client's assessments, recommendations and approvals, service delivery status, and goals.
2. The "Plans" function shows the plans that have been created based on the client's care needs, including the client's current support plan.
3. The "Current care approvals" function shows what care types the client is currently approved to receive.
4. The "Relationships" function shows people who are involved in the client's care needs.
5. The "Services" function shows what services the client is currently receiving, or has previously received.
6. The "Profile" function shows client contact information and personal details. You can also print a PDF version of the client record.
7. The "Reports" function allows you to view and print previously generated client information.
8. The "My Aged Care interactions" function shows contact the client has had with My Aged Care.
9. The "Attachments" function allows you to add important documents to the client's record.
10. The "Notifications" function shows new and historical notifications from My Aged Care.

> ⚠️ For further information about the functions that can be performed in the My Aged Care client portal, including setting up and receiving email notifications for a client that you represent, refer to the [My Aged Care Client Portal User Guide](#).

> ⚠️ As you are logged in from your myGov account, your name will still display on the home page (as above). You can see which client record you are viewing by looking at the top right corner of the page, which displays as follows:
>
> | |
> | --- |
> | You are acting on behalf of Elizabeth BRADSENT Back to relationships page |
> | **Welcome Wendy** |
>
> To view other clients you are representing or return to your record, select 'Back to relationships page'

How do I cease being a representative?

If you wish to remove your link with any clients that you represent or relationships that you have in My Aged Care, select the 'Remove' icon.
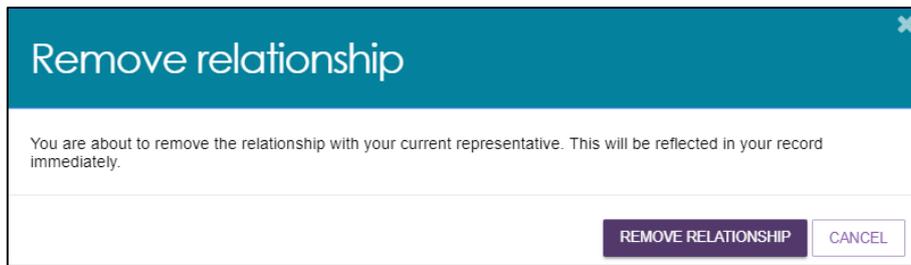
A client is able to remove a Regular Representative from their portal, but cannot remove an Authorised Representative.

> ⚠️ Removal of a relationship will not delete a client or representative's record. It will only remove the link between the two records.
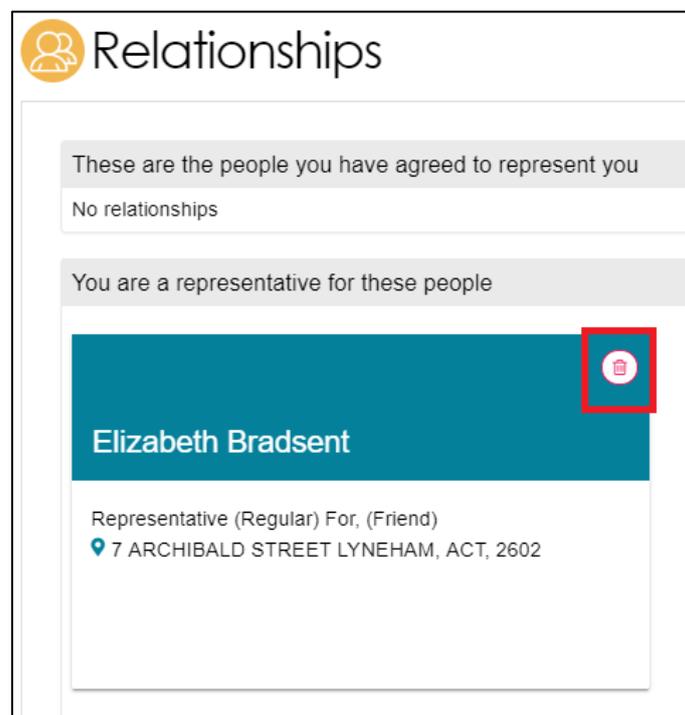
You will be asked to confirm the removal of the relationship.

Once 'Remove Relationship' is selected, you will no longer have access to the client's record.

> ⚠️ To regain access to the client's record, you will need to re-establish the representative relationship via the My Aged Care contact centre. This can be done with the consent of the client over the phone, or by completing the 'Appointment of Representative' form.