How to use the My Aged Care Client Portal

June 2020

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1. What can I find in this guide?

The My Aged Care Client Portal User Guide (Client Portal User Guide) outlines how clients (you) and representatives (such as carers or others who may act on your behalf) will use the My Aged Care client portal (the client portal).

This user guide will provide you and/or your representatives with information on how to access the client portal, view and maintain your personal details and who you can contact for further assistance.

You can view your My Aged Care client record, view and update personal and representative details, and see your interactions with My Aged Care, including assessment outcomes, support plans and service information.

> ⚠️ To access the client portal, you must link your My Aged Care client record to your myGov account. For steps on linking and accessing your client record, please refer to Accessing the My Aged Care Client Portal.

> ⚠️ To protect your privacy, be sure to sign out of myGov when you leave the Client Portal. Logging out or leaving the Client Portal will not automatically sign you out of myGov. To sign out of myGov:
> 1. Go to my.gov.au
> 2. Select 'Sign out' in the top right hand corner of the myGov website.
> 3. The message 'You have signed out of myGov' will be displayed.

1.1 What is the client portal used for?

The client portal is the key tool for you and your representatives to view your aged care services. You can use the portal to:

- View a summary of your interactions with My Aged Care
- View and update your personal details
- View and update your relationships including representatives and primary contact person
- View your current support plans
- View your current care approvals
- View the aged care services you are currently receiving
- View your interactions and communications with My Aged Care
- View and upload attachments
- View and print your information e.g. Referral Code letter.

This is the home page of the client portal, and the first page you will see when you log into the client portal.
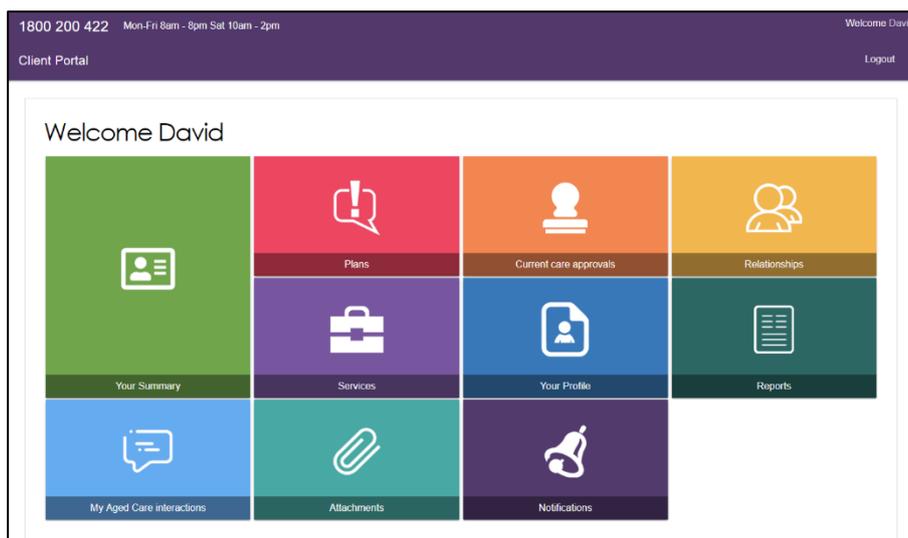
You can access the following functions from the client portal homepage:

1. "Your Summary" function shows key information about your interactions with My Aged Care and summarises your assessments, service recommendations and approvals, service delivery status, and goals.
2. The "Plans" function shows the plans that have been created based on your care needs.
3. The "Current care approvals" function shows what care types you are currently approved to receive.
4. The "Relationships" function shows people who are involved in your care needs.
5. The "Services" function shows what services you are currently receiving.
6. The "Your Profile" function shows your contact information and personal details.
7. The "Reports" function allows you to view and print previously generated client information.
8. The "My Aged Care interactions" function shows contact you have had with My Aged Care.
9. The "Attachments" function allows you to add important documents such as your power of attorney.
10. The "Notifications" function shows new and historical notifications you have received from My Aged Care.

1.2 Key Term   Description

ACAT/ACAS	Aged Care Assessment Teams (ACATs) or Aged Care Assessment Service (ACAS) in Victoria, conduct face-to-face comprehensive assessments to determine a client's eligibility for care types under the *Aged Care Act 1997* (the Act), with approval subject to a decision by an ACAT Delegate.
Client record	People seeking access to aged care services will have a client record created by My Aged Care. The client record will include client details (and carer or representative details), details about assessments and support plan, and information about service(s) received. Clients will be asked to provide consent to enable their client record to be shared with assessors and service providers. Assessors and service providers will update information on the client record, and clients and their representatives will be able to view this information on the client portal, via myGov.
Consumer	People without a client record.
Client	People who have registered with My Aged Care and have a client record.
Client service information	Information about services that a provider delivers to a client. The provider is required to enter this information into the client record via the My Aged Care provider portal. Clients and their representatives will be able to view this information on the My Aged Care client portal, via myGov.
Interim HCP	An Interim Home Care Package is a Home Care Package assigned or received by a client, at a level lower than their approved level of care.

A client can choose not to be considered for assignment of an Interim Home Care Package, and can set a minimum level for an Interim Home Care package (up to 2 levels lower than their approved level). |
| National priority system | The way in which home care approved clients are prioritised for assignment of a Home Care Package. This process is managed by the department based on the outcomes of assessments and approvals for home care as completed by ACATs. |

RAS	The My Aged Care Regional Assessment Service (RAS) conduct face-to-face home support assessment for clients seeking to access Commonwealth Home Support Programme (CHSP) services.
Referral for assessment	A referral sent by My Aged Care staff requesting an assessment (home support or comprehensive) for a client. Referrals can also be requested via the *Apply for an assessment online* form on the My Aged Care website.
Referral for service	A referral sent by either My Aged Care contact centre staff or assessors requesting services for a client. Referrals can be sent electronically to a provider, or a client can be provided with a referral code.
Representative	Clients can nominate one or more representative(s) (e.g. a carer) to speak and act on their behalf. A representative is registered and has a record in the My Aged Care system. The My Aged Care system enables a representative to be classified as regular or authorised. If an older person is capable of providing consent for someone else to speak and act for them, they can set up someone else as their **regular representative**. If an older person is not capable of providing consent for someone else to speak on their behalf, they will need an **authorised representative**. Authorised representatives need to provide My Aged Care with legal documentation to show that they can legally act in this role.
Seeking services	Seeking services/not seeking services is an indicator of a client approved for home care and their preference for accessing a Home Care Package. If the client is approved for a Home Care Package and seeking home care services they will be added to the national priority system to await assignment of a Home Care Package.
Service finders	A search function available on the My Aged Care website that allows an individual to view service information for government funded aged care services.
Support plan	A plan developed by the home support assessor or comprehensive assessor with the client. The support plan identifies the client's needs, goals and service preferences. Assessors and providers will be able to view a client's support plan via the My Aged Care portals. Clients and their representatives will be able to view this information on the client portal, via myGov. A copy can also be provided to the client by the assessor.

2. How do I view a summary of my interactions with My Aged Care?

You are able to view a summary of key information about interactions you have with My Aged Care, which can include:

- Information about your movement through My Aged Care
- Assessment information for assessments conducted by My Aged Care
- Current Care Approval information
- Service recommendations that assessors have made
- Service delivery status of any services in place (or that have ended) with a service provider
- Goals that you set as part of the assessment process
- Information about any heightened support assessors may be giving you (these are called Reablement and linking support periods)

Select the 'Your Summary' icon from the client portal home page.
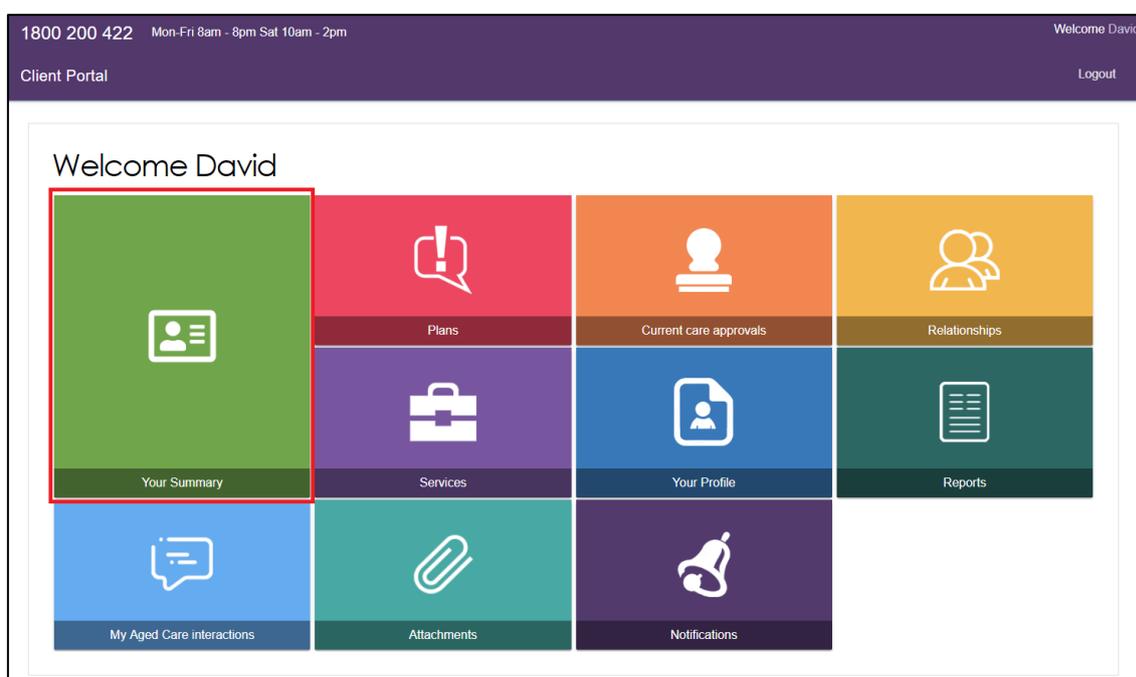
The 'Your summary' page will be displayed, including 'Your tracker' and 'Your summary' headings.

Your tracker is displayed at the top of the page. This is a real-time tracker of your journey through My Aged Care, including where you're up to in your journey and any next steps you may need to take.

The stages of the tracker are:

1. **Registered** (you have been registered with My Aged Care)
2. **Assessment** (you have had an assessment or are having an assessment to determine your care needs)
3. **Waiting for services** (you have had an assessment and have been recommended for services)

4. **Receiving services** (a provider has accepted your service referral and commenced services)
5. **Support Plan review** (you are undergoing review by an assessor)
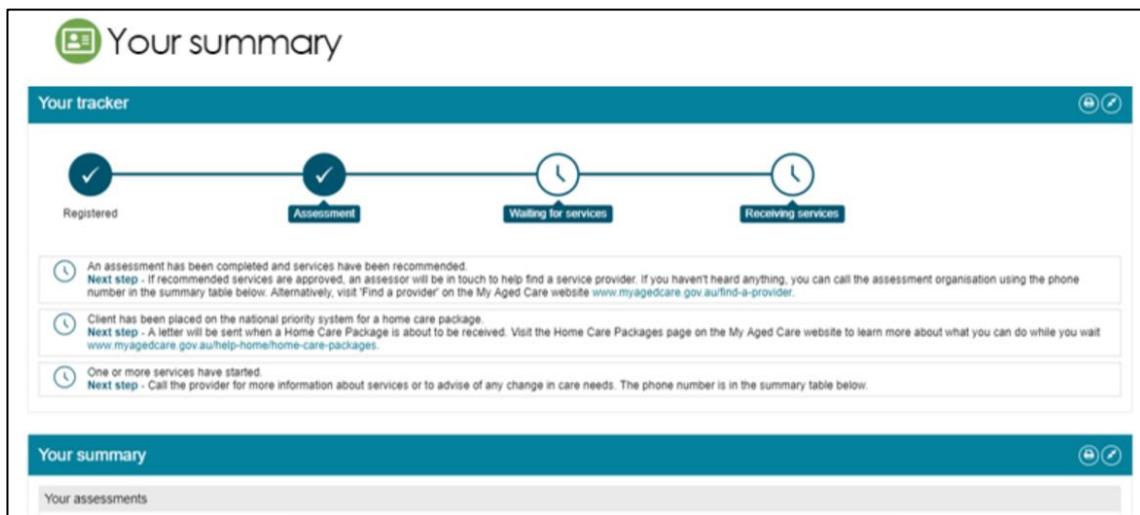
You can expand and minimise 'Your tracker' by selecting the arrow button on the right hand side of the 'Your tracker' heading.

⚠️ You can print 'Your tracker' by selecting the print button on the right hand side of the 'Your tracker' heading.
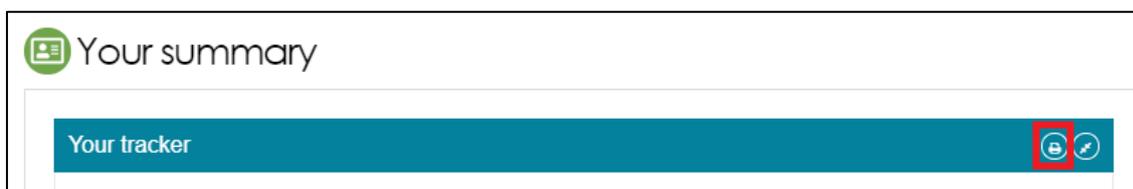
'Your summary' displays a summary of your interactions with My Aged Care.

Your assessment information will be displayed under 'Your summary' heading.

You can view any completed assessments by selecting the icon next to the assessment.

Your care approvals, service recommendations and service information will be displayed in the middle of the page.
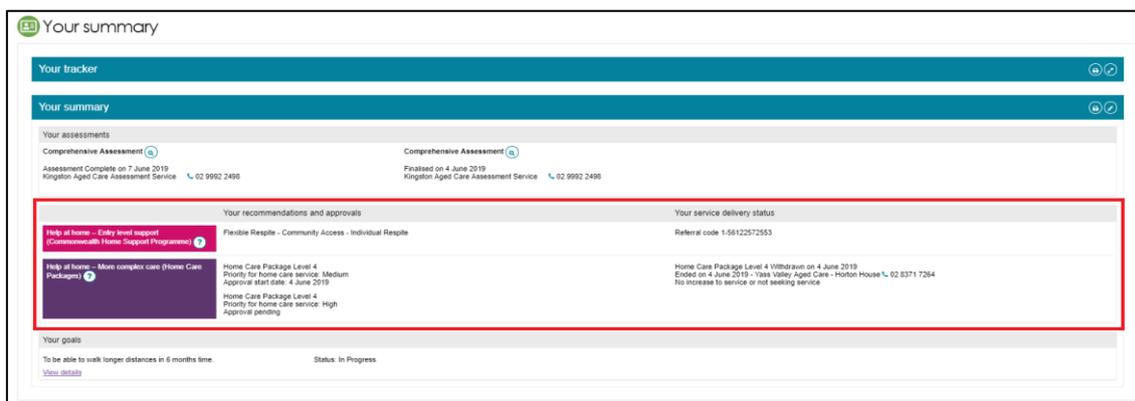
⚠️ If you have been approved for a home care package or have received any letters in relation to your home care package, you can view these letters by selecting 'View home care package letters'. If you have representative/s they will be automatically opted in to receive copies of these letters.

Information about your goals is displayed at the bottom of the page, and to view more details about your goals, select 'View details'.

This will take you to your current support plan where you can view further information about the goals and recommendations recorded as part of your assessment.
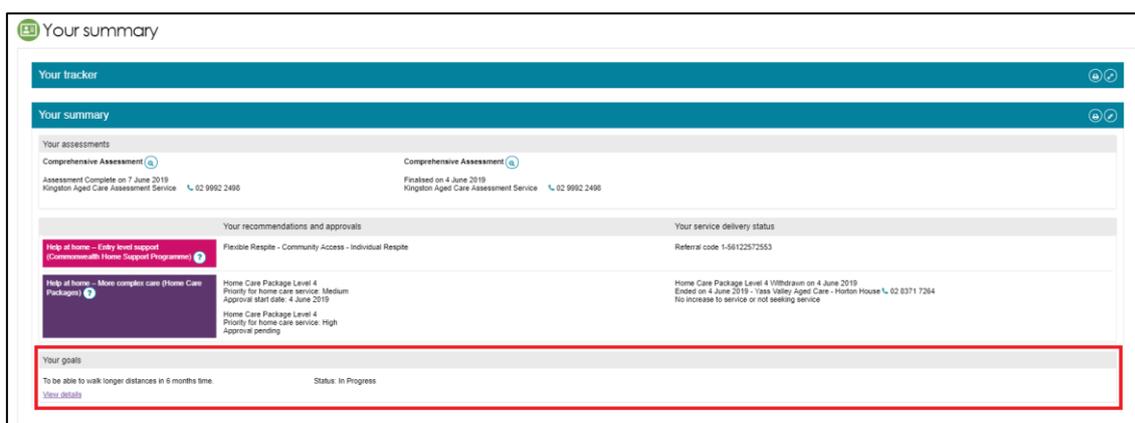
⚠️ You can print 'Your summary' section by selecting the print button on the right hand side of the 'Your summary heading.

3. How do I view and update my personal information?

You can view and update your personal information in the My Aged Care client portal.

This will enable you to check on the details and update your personal information such as address and contact details at any time.

Step One: Select the 'Your profile' icon from the client portal home page.
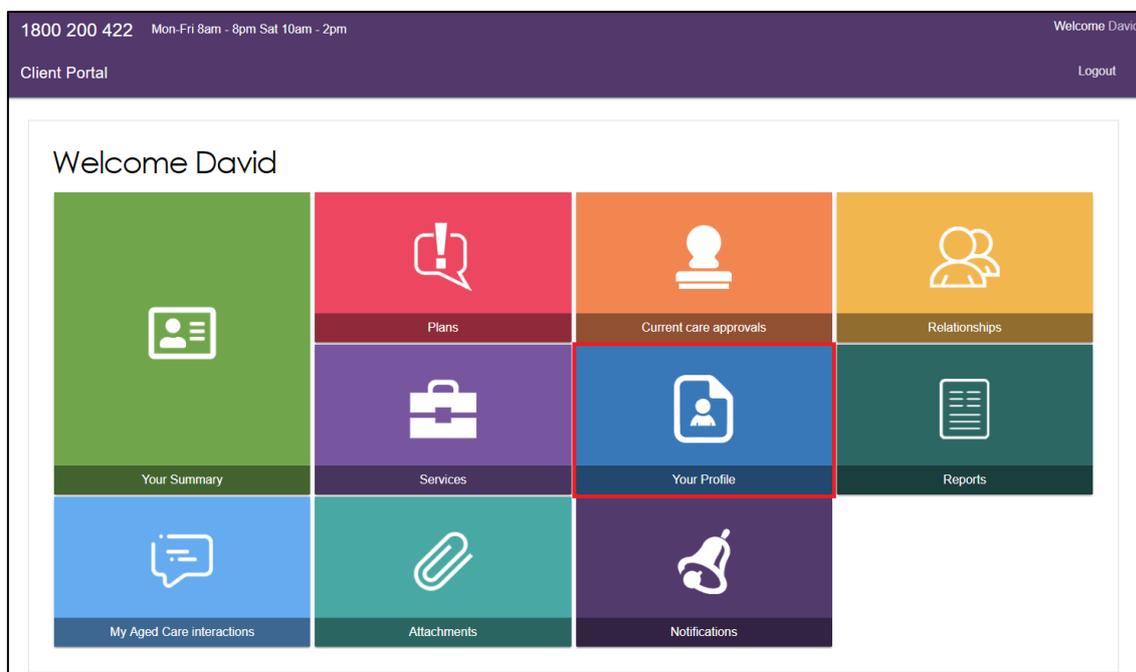
This will bring you to the 'Your profile' page.
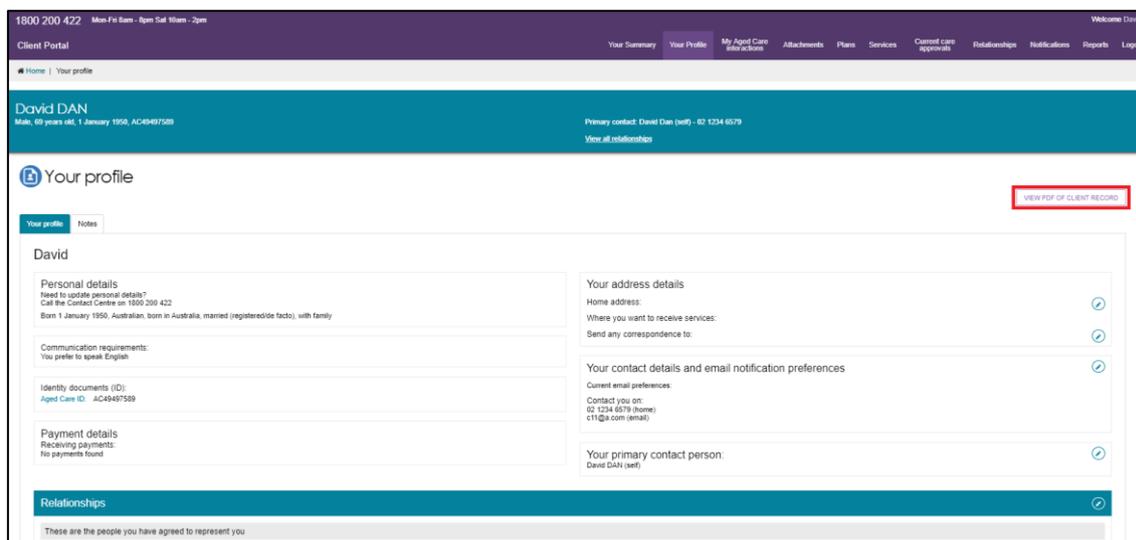
On the 'Your profile' page you can view the following information:

- Personal details
- Communication requirements
- Identity documents
- Payment details

- Address details
- Contact details and notification preferences
- Primary contact person
- Relationships
- Support plans and care approvals
- Services in place
- Interactions with My Aged Care.

You can also print a copy of your client record and view a PDF summary of your My Aged Care client record.

Step Two: To update any field, select the Edit button next to the field.

For example, if you wish to edit your Primary Contact, who will be the first point of contact on your behalf, for phone calls from My Aged Care, assessors and service providers, select the edit Primary contact person button.

Step Three: Select 'Save' once you have completed editing your information.

This will update the information in your client record, which can be viewed by providers, assessors and the My Aged Care.

3.1 Setting up email notifications

You and your representatives can select to receive email notifications when you reach key stages of your My Aged Care journey.

The five key stages are:

1. Client registration is complete.
2. The clients assessment is finalised.
3. The client is approved for care after a comprehensive assessment.
4. A client is assigned a Home Care Package.
5. A support Plan Review request has been submitted.

Follow the steps below to set up and revise who can receive email and/or SMS notifications.

Step One: Select the edit *Your contact details and email notification preferences* button.

Step Two: A pop up screen will appear. In the pop up, select the 'Consent to receive SMS and emails for client notifications?' checkbox**.**

Step Three: By selecting the 'Consent to receive SMS and emails for client notifications?' checkbox, you will automatically enable notifications to your email address ('Self').

Step Four: If you would like email notifications to be sent to one or more representatives, select the checkbox next to their name. Select 'Save' when finished.

⚠️ To remove email notifications to any person, you can unselect the checkbox next to their name at any time.

⚠️ To be eligible to receive email notifications, you and/or your representatives must specify an email address in My Aged Care. This email should be the email address that you use to access the My Aged Care client portal from myGov.

You can specify your email address in the 'E-mail' field in the *Your contact details and email notification preferences* web form:

Contact details

Preferred correspondence method	Preferred contact number * Home
Home phone number: * 02 1234 5678	Country code: 🇦🇺 Australia +61	Mobile phone number: 0412 345 678
Business phone number: e.g. 02 1234 5678	Other phone number: e.g. 02 1234 5678
Preferred callback day	Preferred callback times
E-mail: asd@asda.com	Fax:

To add an email address for a representative who would like to receive email notifications, your representative should contact an assessor or call My Aged Care on 1800 200 422.

3.2 Setting up SMS notifications

You and your representatives can select to receive SMS notifications when you reach key stages of your My Aged Care journey.

The five key stages are:

1. Client registration is complete.
2. The clients assessment is finalized.
3. The client is approved for care after a comprehensive assessment.
4. A client is assigned a Home Care Package.
5. A support Plan Review request has been submitted.

To prompt SMS notifications you and your representatives must have a verified phone number.

Follow the steps below to verify your mobile number:

Step 1: Select the 'Verify 'button next to your mobile number.

Step 2: My Aged Care will send you a 6-digit verification code to your mobile number.

Enter this code into the Verification code field and select the 'Verify' button.

Step 3: If you have entered the correct code, you will have successfully verified your number

After you have verified your number, follow the steps below to set up and revise who can receive SMS notifications.

Step One: Select the edit button for 'Your contact details and email notification preferences'.

Step Two: A pop up screen will appear. On this screen, click the 'Consent to receive SMS for client notifications?' checkbox**.**

Step Three: By selecting the 'Consent to receive SMS for client notifications?' checkbox, you will enable SMS notifications be sent to your mobile phone number ('Self') and other representatives.

SMS messages will only be sent to those who have a verified mobile number.

Step Four: If you would like SMS notifications to be sent to one or more representatives, select the checkbox next to their name. Select 'Save' when finished.

To send SMS notifications to representatives, they will also have to verify their mobile number.

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⚠️ To remove SMS notifications to any person, you can unselect the checkbox next to their name at any time.

⚠️ To be eligible to receive SMS notifications, you and/or your representatives must specify a mobile phone number in My Aged Care. This mobile phone number should be the mobile phone number that you use to access the My Aged Care client portal from myGov.

You can specify your mobile phone number in the 'Mobile Phone Number' field in the *Your contact details and notification preferences* web form:

To add a mobile phone number for a representative who would like to receive SMS notifications, your representative should contact an assessor or call My Aged Care on 1800 200 422.

4. How do I view and update My Aged Care relationships?

You can view and update information about relationships you have with representatives or carers in the client portal.

Agreeing for someone to be your representative in My Aged Care allows them to speak and act for you. A representative can do things for you like:

- give information to My Aged Care, including talking to assessors, the My Aged Care contact centre and service providers
- get information about your progress in My Aged Care
- make decisions about aged care assessment and referrals for aged care services
- see and update your My Aged Care client information through My Aged Care or via myGov
- be listed as your primary contact so they are the first contact point for My Aged Care.
- receive copies of letters related to your Home Care Package

There are four ways to put in place a regular representative:

- Call My Aged Care on 1800 200 422 with your chosen representative. My Aged Care can call your representative later if they can't be with you for this call, or
- Complete the My Aged Care 'Appointment of a Representative' form and mail it to My Aged Care, PO Box 210, Balwyn, Victoria, 3103, or fax it to My Aged Care (1800 728 174), or
- If your representative is with you at your aged care assessment, you can ask the assessor to add them as your representative at that time, or
- Nominate a representative when you create a My Aged Care client record using the *Apply for an assessment online* form.

> ⚠️ You must have the person's agreement before nominating them as a regular representative. Once you have their agreement, you will need to provide some personal information about your representative.

There are several types of relationships that are displayed on this page:

- **Carer** – a person who has an ongoing role in supporting you and your needs (e.g. a family member or friend)
- **Emergency contact** – a person to be contacted in case of an emergency
- **Primary contact** – a person (which can be yourself) who will be the first point of contact for phone calls.
- **Representative** – a person (or organisation) who has authority to undertake actions on your behalf for functions within My Aged Care. A representative gains this authority either by being nominated by you or being appointed under a legal basis:
  - **Regular** – nominated by you by providing consent for the representative to act on your behalf; or

o **Authorised** – appointed under a legal basis to act on your behalf. The legal documents need to be provided to My Aged Care in order to become an authorised representative and shows us that someone can legally make health, personal and lifestyle decisions for you.

Step One: Select the 'Relationships' icon from the client portal home page.
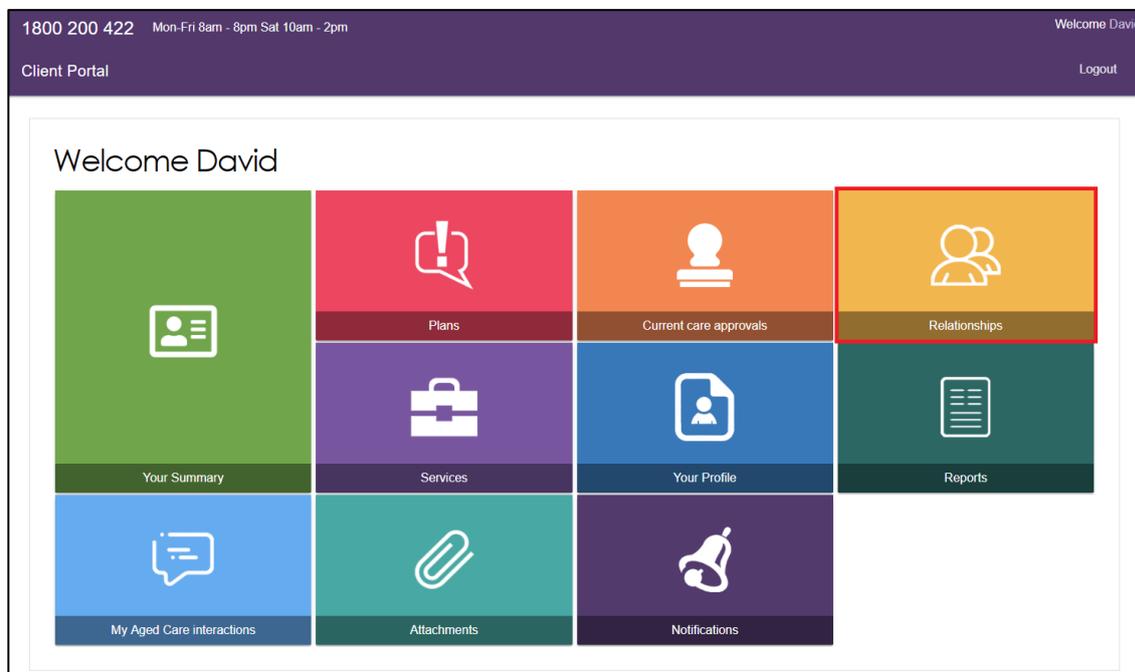
Step Two: This will bring you to the 'Relationships' page where you can view the following information:

- People who represent you
- People you represent
- People you look after
- People who look after you
- Previous relationships.
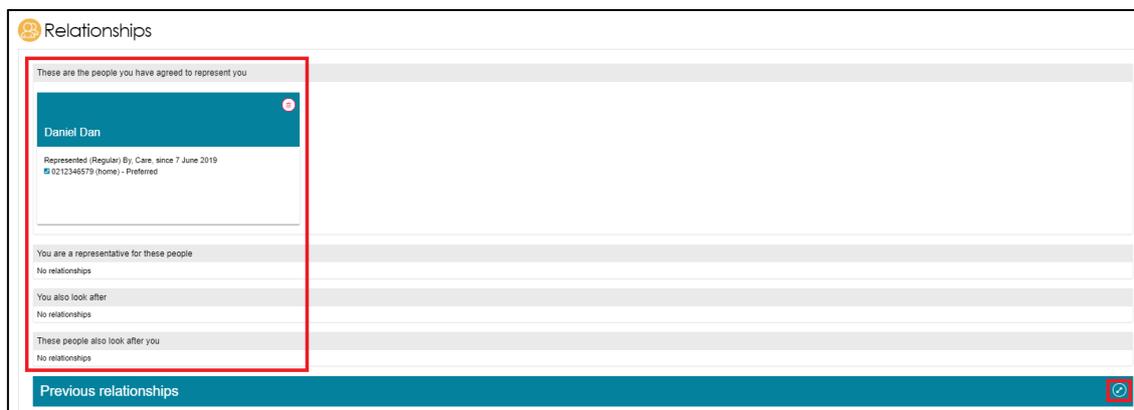
To expand the 'Previous relationships' section, select the arrow button on the right hand]side of the heading.

⚠️ If you'd like to remove a regular representative, select the 'Remove' button on the representative's card. Then select the 'Remove Relationship' button in the pop up screen.
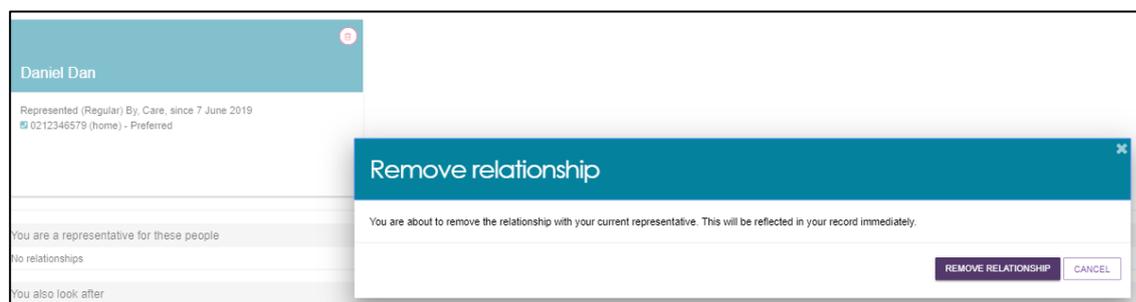
If you have more than one relationship, you can remove each relationship by selecting the corresponding remove icon.

You may also choose to select a date for the representation to end, after which the representative's rights will cease.

⚠️ If you no longer need an authorised representative, your **authorised representative** will need to call My Aged Care to make the change.

# 5. How do I view my current care plans?

You can view your current plans in the client portal. This will enable you to check on the details of your Support Plan at any time.

Select the 'Plans' icon from the client portal home page.
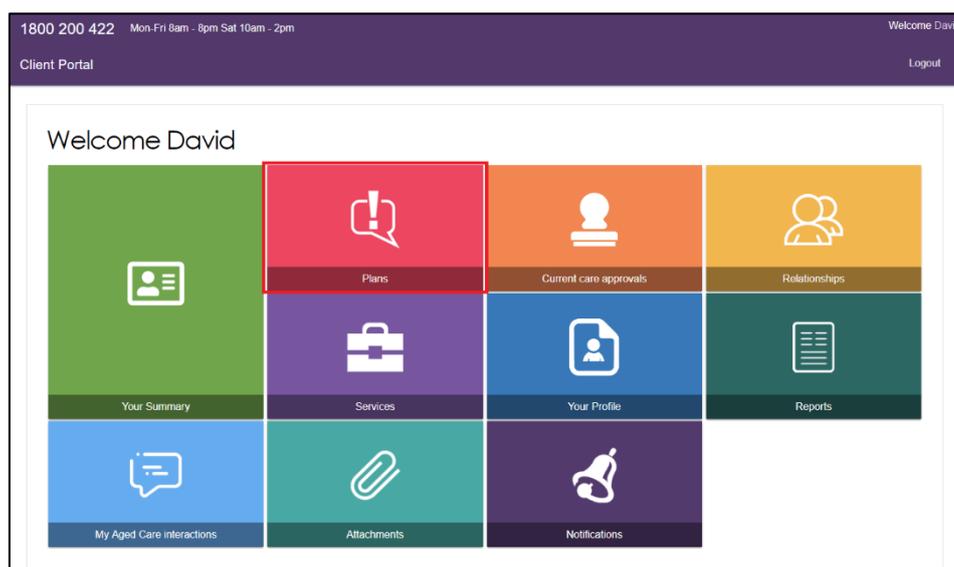
This takes you to the 'Plans' page, where you can view your Support Plan.

It contains details of your individual concerns and goals as discussed and agreed between you and your assessor. Following a completed assessment by an Aged Care Assessment Team (ACAT) or Regional Assessment Service (RAS), details of your Support Plan will be displayed.
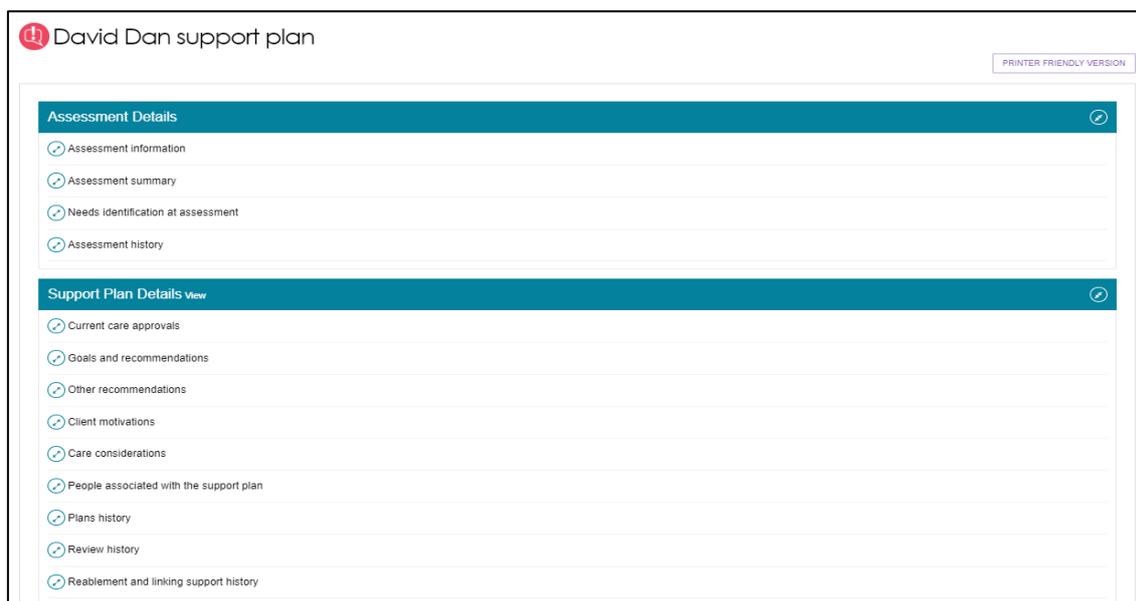
6. How do I view my current care approvals?

You can view your current care approvals, such as approvals for Residential Care or Home Care Packages, in the client portal without having to contact the assessor who completed your assessment.

Select the 'Current Care Approvals' icon from the client portal home page.
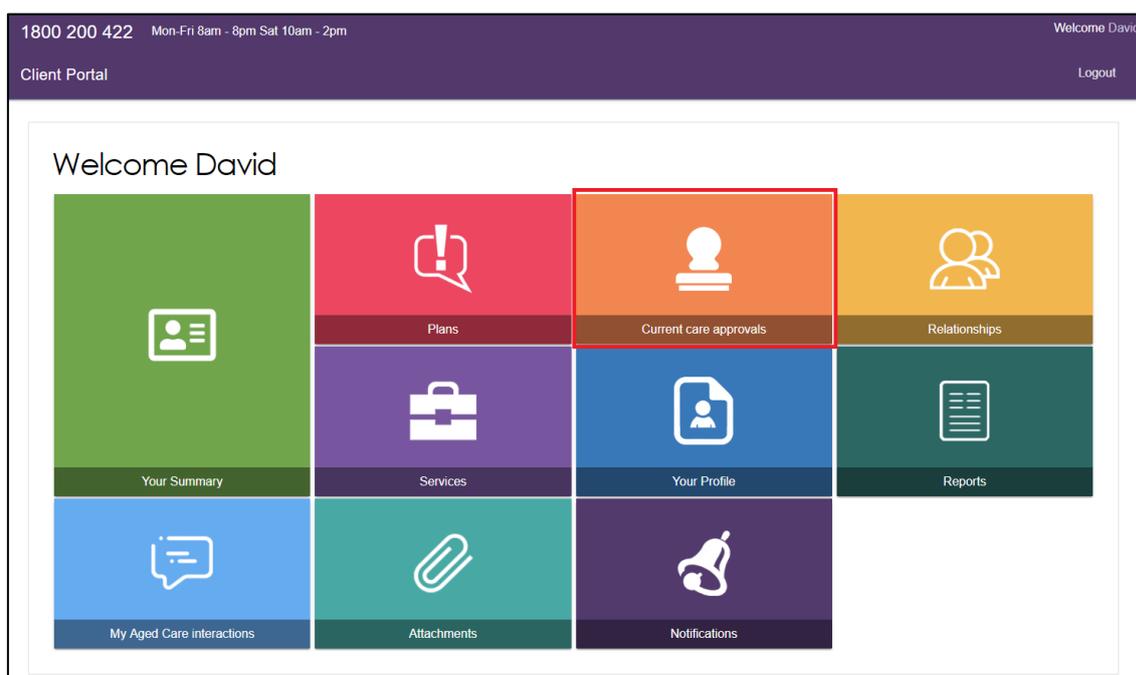
This will take you to the 'Approvals' page, where you can view any care approvals you have received.
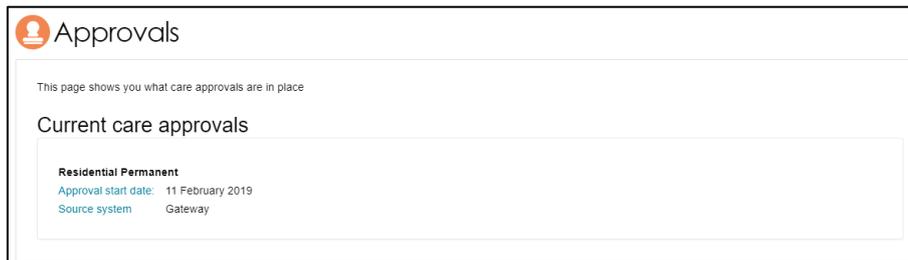
6.1 For clients with Home Care Package approvals

If you are approved for a Home Care Package you will be able to see some additional information regarding your approval on this page.

> ⚠️ If you are in the national priority system awaiting a medium priority Home Care Package, you will receive a letter to notify you of the upcoming assignment of your first package approximately three months prior to the expected assignment date.
>
> This letter is aimed to encourage you to commence the preparation required to take place prior to the Home Care Package assignment and commencement of services.
>
> A copy of this letter will appear on the client record under the 'Attachments' tab with the other Home Care Package letter.
>
> A copy of this letter will also be sent to your representative/s, unless they have opted out to receive the letter. Only regular representatives are able to opt out.

In addition, you can choose to opt in or out of the national priority system for Home Care Packages.

You can do this by selecting the edit icon next to 'Seeking services' or 'Not seeking services'. This can be found under the 'Home care' section of the page.

Selecting the edit icon will bring up the following pop up:

If you choose:

- 'Seeking Services', you will be placed in the national priority system and will be assigned a Home Care Package based upon your priority and the length of time since you were approved for home care.
- 'Not seeking Services', you will be removed from the national priority system and will not be assigned a Home Care Package. You can change between 'seeking services' and 'not seeking services' as many times as you need to.

7. How do I view my current aged care services?

You can view the aged care services you are currently receiving in the client portal.

This will enable you to check on the status and details of the services at any time.

Select the 'Services' icon from the client portal home page.
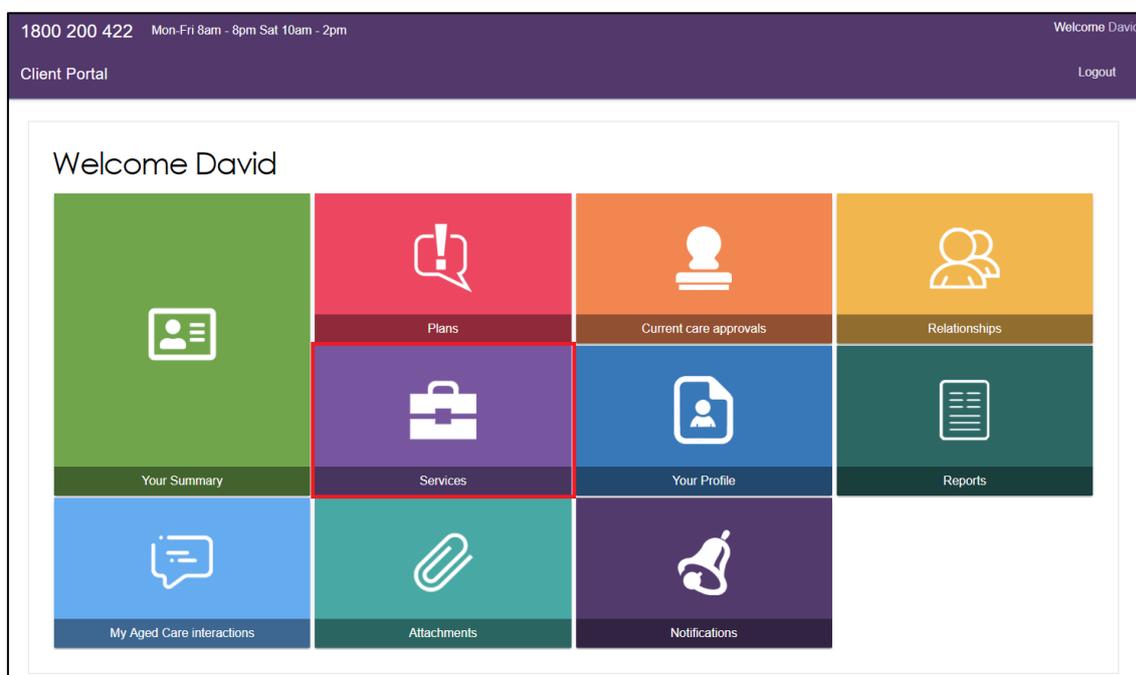
This will take you to the 'Services' page, where you can view the following information:

- **Current services in place**: these services and care have already been assigned to a service provider and service delivery has already started.

- **Referrals for services**: these services have been recommended as part of your support plan, but have yet to be accepted by a service provider.

On this page, you are also able to view previous services that have been completed or ceased and are no longer being delivered.

Depending on whether the services are already in place, pending or ceased, each entry can have information regarding:

- service type;
- details of the service and service provider details;
- details about the referral; and
- service dates or recommended start dates.

You are also able to:

- view existing referral codes;
- generate/reactivate referral codes; and
- print or download the Referral Code letter.
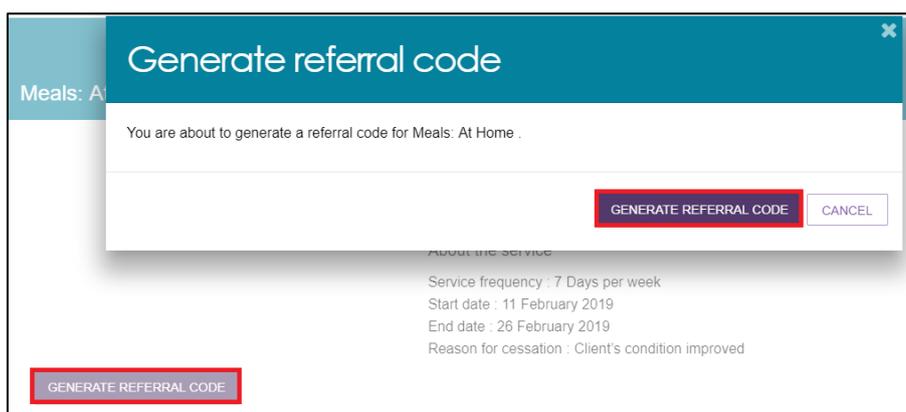
When a referral code has been successfully generated, a message will appear on screen and the referral code will be displayed.
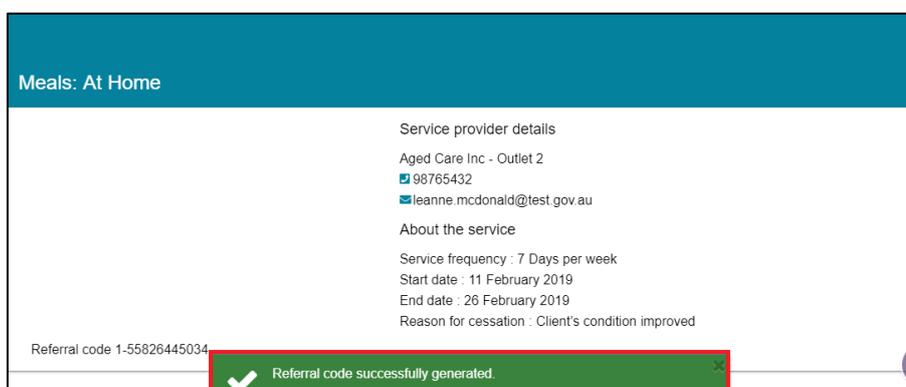

⚠️ You can use this referral code and take it to a service provider that you are interested in commencing services with, who will then be able to access your referral using this code in their portal (the My Aged Care provider portal).

8. How do I view my interactions with My Aged Care?

You can view the interactions you have with My Aged Care in the client portal. These may be phone calls, web enquiries, faxes', SES or email communication you have with My Aged Care.

You will be able to check the details of all your interactions at any time, without having to call My Aged Care.

Step One: Select the 'My Aged Care Interactions' icon from the client portal home page.
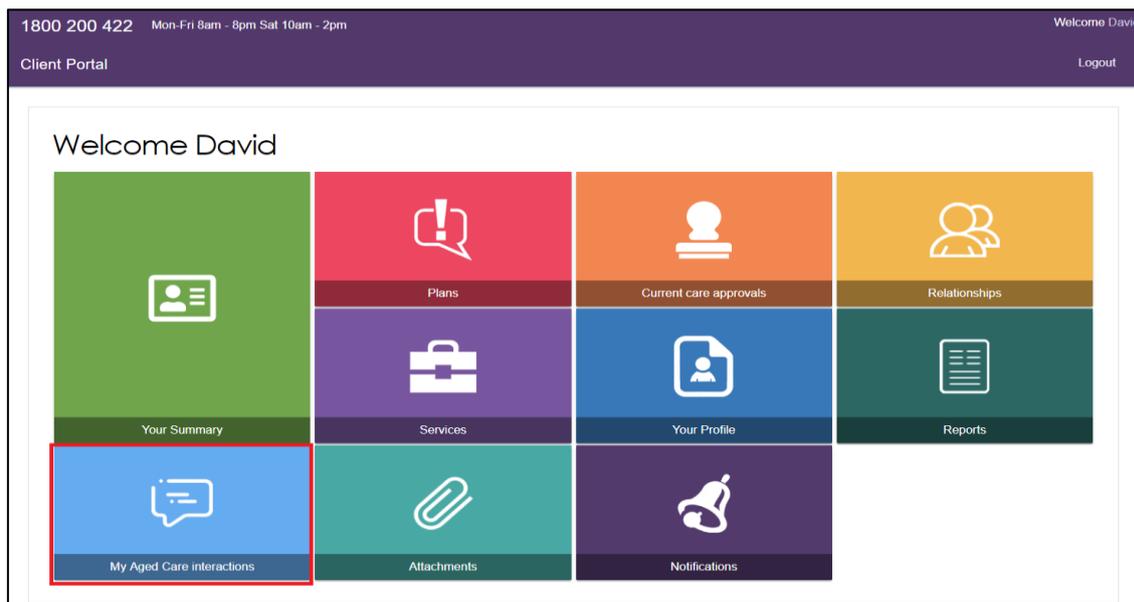
This will take you to the 'My Aged Care Interactions' page, where you can view details of your previous interactions with My Aged Care.
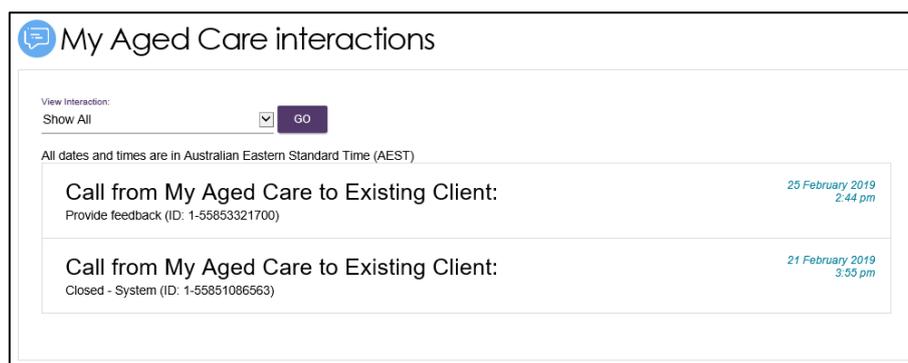
9. How do I view and upload attachments

You can view and upload attachments in the client portal, such as legal documents, an [Appointment of a Representative Form](#), medical information or diagrams, or other relevant documents.

> ⚠️ If the document you upload needs to be actioned, please call My Aged are to let them know the document is available.

This will enable you to check the details of attachments that have been provided to My Aged Care, such as legal or medical documents provided by your authorised representative or doctor. You can also upload new documents at any time, without having to call My Aged Care.

Step One: Select the 'Attachments' icon from the client portal home page.
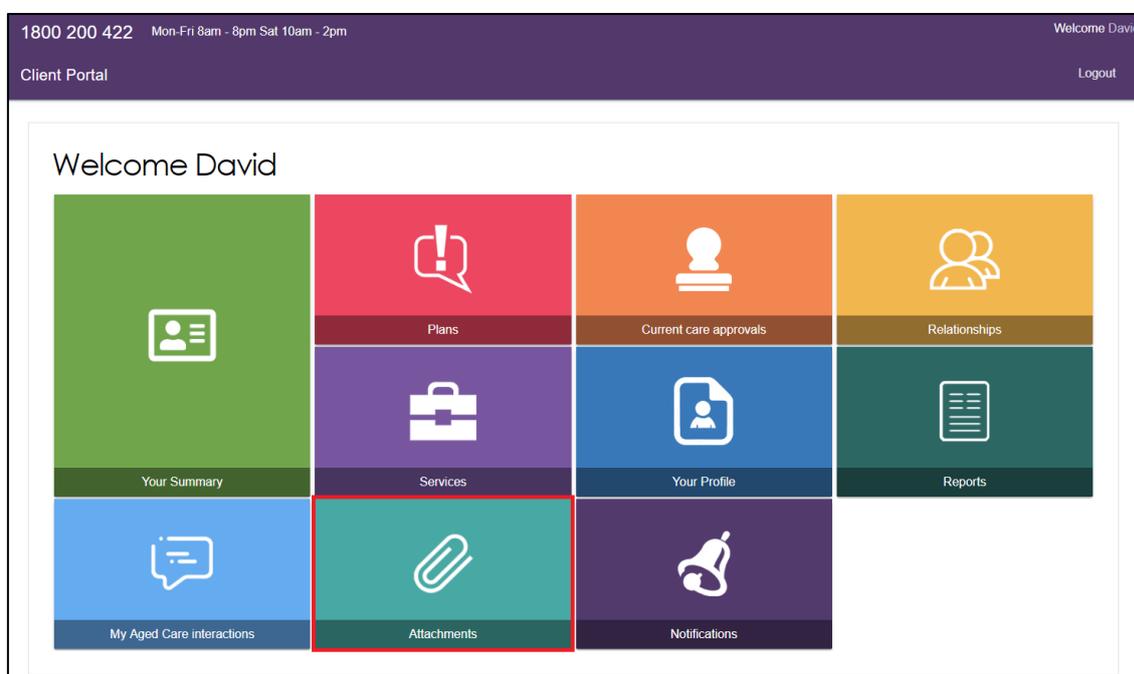
This will take you to the 'Attachments' page, where you can view details of attachments that have been uploaded to My Aged Care.
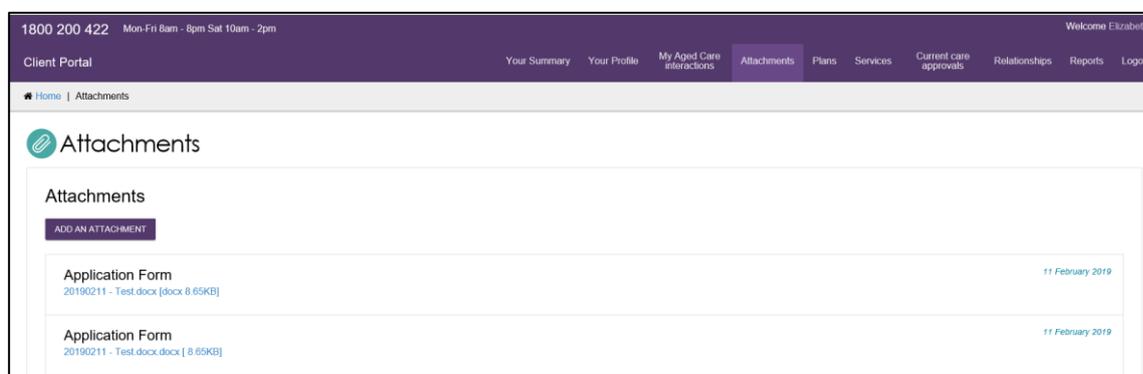
Step Two: Select the 'Add an attachment' button at the top of the page to upload a new attachment.

You can then browse for the attachment and input the name and type of the attachment. Select 'Upload' to upload the file.


A message will be displayed at the top of the screen when the attachment has been successfully uploaded.


Step Three: You also have the ability to hide attachments from view. The particular attachment will not be visible to assessors and service providers when hidden. Only the My Aged Care contact centre will be able to see this attachment.

To hide the attachment, select the 'Hide' icon.
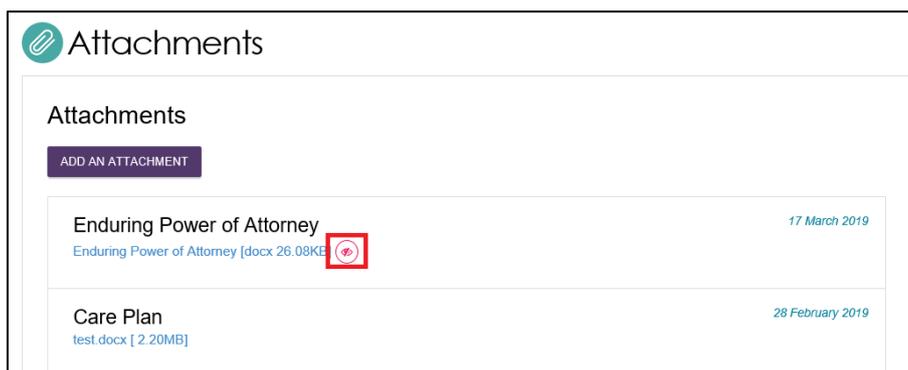
In the pop up box, select 'Hide'.
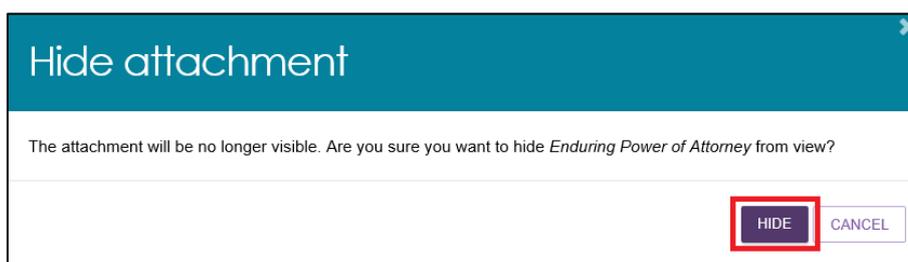
A confirmation message will display.

⚠️ Only the following attachments can be hidden from the client portal:

- Appointment of Enduring Guardian
- Appointment of Representative form
- Enduring Power of Attorney
- Guardianship Order
- Legal documentation
- Letter by Medical Practitioner
- Statutory Declaration

10. How do I view notifications?

You can view notifications you received from My Aged Care as you progressed through your aged care journey.

Step One: Select the 'Notifications' icon from the client portal home page.
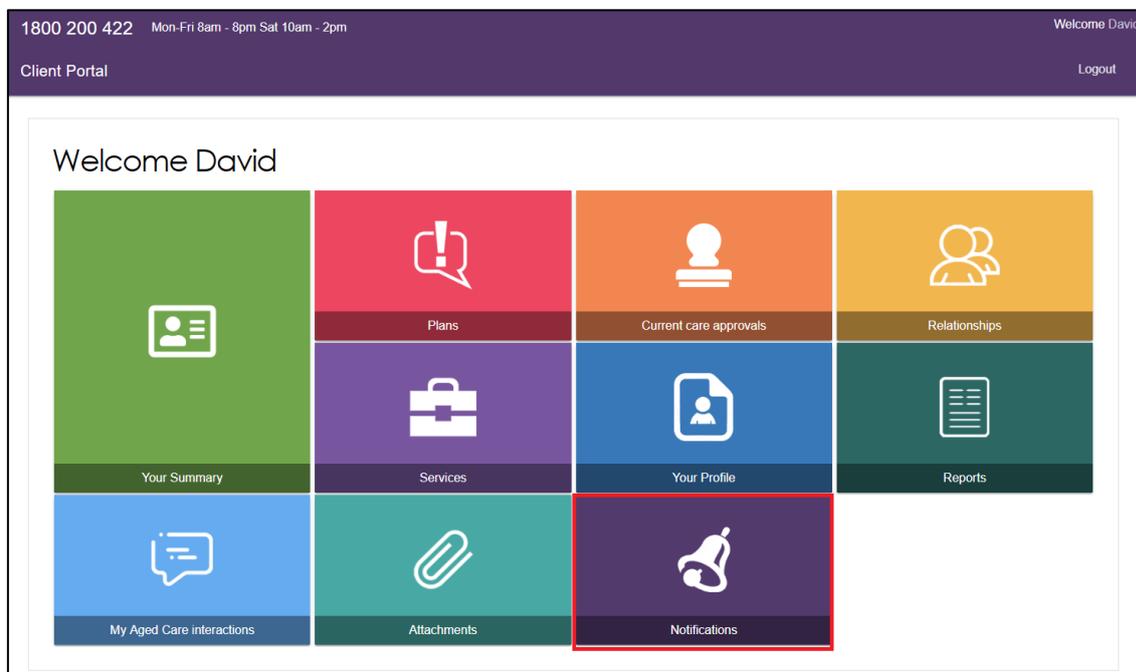
This will take you to the 'Notifications' page, where you can view details of notifications you received from My Aged Care as well as the channel type. You can receive these notifications via email and SMS by following the steps in section *3.1 Setting up email notifications* and *3.2 Setting up SMS notifications*

11. Where can I find out more information?

You can contact My Aged Care on 1800 200 422. My Aged Care is available from 8am to 8pm Monday to Friday and 10am to 2pm Saturday in your state or territory. You can also visit the My Aged Care website at www.myagedcare.gov.au.

Further information on getting help to talk to My Aged Care is also available at: https://www.myagedcare.gov.au/contact-us

Need an interpreter?

If you speak a language other than English you can phone the Translating and Interpreting Services (TIS) on 131 450. TIS covers more than 100 languages and is available 24 hours a day, 7 days a week, for the cost of a local call.

Alternatively, you can call My Aged Care on 1800 200 422 to organise an interpreter through TIS.

Have a hearing or speech impairment?

If you suffer from hearing or speech impairments, you can use the Telephone Typewriter (TTY) service on 133 677 or 1800 555 677 (for 1800 freecall numbers) so that My Aged Care can support you.

Emergency Calls

If you require urgent medical assistance, call triple zero (000).

For emergency respite support, call the Commonwealth Respite and Carelink Centre (CRCC) on **1800 059 059**.