My Aged Care
Concept of Operations
1. Purpose

My Aged Care is a key feature of the Commonwealth Government’s changes to aged care which seek to deliver a better, fairer, sustainable and nationally consistent aged care system. The changes are being progressively implemented in three phases over ten years, and aim to ensure the aged care system is the best possible system for Australia and is sustainable and affordable. The system will provide older people with more choice, easier access and better care.

The Concept of Operations (the document) sets out the vision for My Aged Care and the capabilities and operations that will be in place nationally from 1 July 2015 (Stage Two). In doing so, it describes the business model and IT capability being delivered to support consumers, clients and their representatives, assessors, service providers and My Aged Care contact centre staff.

The current stage of My Aged Care (Stage One) is focused upon providing consumers with reliable information about aged care, via the My Aged Care website and contact centre.

The document aims to set out My Aged Care capabilities and operations in sufficient detail for stakeholder representatives to understand:

- the vision and operating model for My Aged Care;
- how it interacts with and impacts on consumers, clients, assessors and service providers;
- the benefits of My Aged Care for consumers and the aged care sector;
- the implementation approach through to July 2015; and
- the basic outline of My Aged Care systems (business and technological components).

The capabilities delivered by My Aged Care will be used by the following people:
1.1 Document scope

1.1.1 What this document is

The document:

- describes how My Aged Care will operate when Stage Two is fully implemented;
- provides a high level description of the client pathways, service provider and assessor interactions with My Aged Care, and underlying ICT support; and
- describes the implementation approach.

1.1.2 What this document is not

The document is not a detailed user guide for My Aged Care business processes. Detailed support material (including user guides) are under development and will be provided in advance of the system roll-out from April 2015 to ensure users are fully prepared.

1.2 Target audience

The document is intended to familiarise the reader with the operations and implementation of My Aged Care. The target audience includes:

- aged care service providers;
- consumer and service provider peak organisations;
- assessors in the form of the Regional Assessment Service (RAS) and Aged Care Assessment Teams (ACATs);
- state and territory governments; and
- health professionals.

1.3 Document Summary

The document is organised into the following sections:

Section 2. Introduction: This section describes the drivers, objectives and benefits of My Aged Care, and the delivery approach, consultation and transition planning.
- Drivers, Vision, Objectives and Benefits of My Aged Care; and
- Delivery Approach, Consultation and Transition Planning for My Aged Care.

Section 3. My Aged Care - Users and Participants: This section describe key groups of stakeholders who will interact with My Aged Care

Section 4. My Aged Care client pathways: This sections describes the pathways for consumers and clients through the aged care system that will be supported by My Aged Care.

Section 5. Assessor interactions with My Aged Care: This section describes assessor interactions with My Aged Care.

Section 6. Service Provider interactions with My Aged Care: This section describes how Commonwealth funded and non-Commonwealth funded service providers interact with My Aged Care.

Section 7. My Aged Care Solution: This section provides the overall My Aged Care solution including the key components, solution objectives and application architecture.
Section 8. My Aged Care Case Studies: This section describes a range of case studies that describe how My Aged Care will operate from Stage Two.

Section 9. My Aged Care Rollout and Readiness Activities: This section describes the rollout and readiness activities required to support the introduction of Stage Two of My Aged Care.
2. Introduction

2.1 Drivers for introducing My Aged Care

Australia’s aged care system is complex and often challenging for consumers to navigate. Traditionally, there has not been one central pathway for people to access information and/or services. As a result:

- people have had difficulty finding trusted information about the aged care system and the types of services that may be available to support people to grow older with dignity and independence; and

- consumers, clients and their representatives find the current system difficult to understand, including understanding the types of services available in their location, eligibility requirements and costs. People have generally needed to directly approach individual service providers for information on services available and the pathway to access those services. This has resulted in people needing to repeat their story multiple times to different providers, a varied approach to assessment from provider to provider, and ultimately different outcomes for clients presenting with similar needs.

The challenge with finding reliable and trusted information and a clear pathway to services has undermined consumer choice and empowerment and made the process unnecessarily stressful and burdensome to many consumers and families, often at a time of family stress or crisis.

The Productivity Commission’s (the Commission) Caring for Older Australians report of June 2011 identified the need for an improved entry point to the aged care system, to help older Australians to retain control over their lives. This would include information being more readily available and easily understood, the development of a simple and more accessible standardised needs assessment process, and access to services from approved providers.

The Commission recommended that a single integrated, independent assessment service be established. The service would use standardised assessment tools (including electronic records) to enable a single initial assessment as the foundation, with various triggers that indicate the need for additional support or more complex assessments where required. This core infrastructure would help avoid inappropriate access to services and ensure government resources are targeted appropriately.

2.2 Vision

The vision for My Aged Care is that:

- older people, their families, representatives and carers have easy access to reliable information on ageing and aged care, have their needs consistently assessed and be supported to locate and access services available to them;

- the focus (as appropriate) is on assisting people to maximise their independence, choice and quality of life, and minimise reliance on future support;

- there is equitable access to services for people across Australia including additional support for people with specific needs;

- the provision of information and services is sensitive to the needs of people with diverse needs; and
• consumers of all socio-economic backgrounds can be connected with Commonwealth, State, charitable, not for profit or privately funded aged care services.

2.3 Objectives

My Aged Care has four main objectives to ensure delivery of the vision:

• create a clear service and information resource for the aged care system with easily identifiable entry points;
• make it easier for older people, their families, and carers to access information on ageing and aged care;
• simplify and standardise aged care needs assessment; and
• provide support for locating and accessing appropriate services.

2.4 Benefits

My Aged Care is directed towards providing benefits to users, participants and stakeholders. The business and operating models have been designed in a manner that reflects the need for flexibility to adjust to environmental characteristics (e.g. clients in remote locations) and individual characteristics (e.g. people with special needs) and ensure that My Aged Care services are available to all older people across Australia.

The benefits that My Aged Care will deliver include:

• better access to relevant and accurate information;
• responsive and innovative services;
• improved and more consistent client outcomes;
• appropriate referrals; and
• equitable access to aged care services.

My Aged Care supports the wider aged care reform benefits through the following outcomes:

Accessibility:

• Greater transparency in quality, pricing and funding
• Greater consumer choice and control
• More older people receiving care and support at home
• Improved system accessibility by older people, their families and carers

Quality:

• Improved and consistent assessment of needs
• Stronger connections between the health and aged care system
• Maintain or improve quality of care

Efficiency

• Increased overall system efficiency
• Reduced waiting time for care
Community

- A system that better meets the needs of older people from diverse backgrounds
- Improved services for people living in rural and remote Australia
- A system that better meets the needs of people with dementia

2.5 Delivery Approach

My Aged Care is being implemented in stages:

2.5.1 Stage One

Stage One of My Aged Care was introduced on 1 July 2013 and includes a:

- My Aged Care website (www.myagedcare.gov.au); and
- My Aged Care telephone line (1800 200 422) that operates from 8am - 8pm Monday to Friday and from 10am - 2pm Saturday, local time across Australia.

My Aged Care currently provides information on aged care and support for consumers to find Commonwealth funded aged care services in their local area. It makes it easier for older people, carers and family members to access reliable information on aged care.

2.5.2 Stage Two

Stage Two of My Aged Care will simplify the way older people have their needs assessed, as well as how they locate and access the services that are most suitable to meet their needs, goals and aspirations. In doing so, My Aged Care will create and support clear and consistent pathways into, and through, the aged care system.

The introduction of Stage Two of My Aged Care will commence in April 2015 within one region in Victoria. This will be followed by the commencement of the national rollout of Stage Two in July 2015 with the introduction of the client record, screening, home support assessment and match and refer capabilities. When all Aged Care Assessment Teams are completing comprehensive assessments via the My Aged Care system, Stage Two will be considered complete.

2.5.3 Future stages of My Aged Care

Future stages of My Aged Care will focus on:

- the introduction of Business to Government capabilities to support the electronic exchange of information;
- further enhancements of the service finders to display a wider range of service information; and
- supporting the move towards a consumer led, virtual market place.

2.6 Consultation

The Commonwealth Government has been working closely with the sector and state and territory governments via regular engagement forums, roadshows, conferences and workshops to collaboratively design Stage Two of My Aged Care. This broad consultation has led to refinement of
Stage Two services, particularly around the design of the National Screening and Assessment Form and the supporting processes for assessment.

### 2.7 Transition Planning

Transition planning has been divided into five key phases. Each phase focuses on increasing levels of awareness and acceptance of the changes that will take place with the introduction of the next stage of My Aged Care. This approach is summarised below:

<table>
<thead>
<tr>
<th>Phase</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal Preparation</td>
<td>Sep - Dec 2014</td>
</tr>
<tr>
<td>Make People Aware</td>
<td>Jan - Mar 2015</td>
</tr>
<tr>
<td>Prepare People</td>
<td>Apr - Mid Jun 2015</td>
</tr>
<tr>
<td>People are Ready</td>
<td>Mid Jun - Jul 2015</td>
</tr>
<tr>
<td>People are Using the System</td>
<td>Jul - onwards</td>
</tr>
</tbody>
</table>

Change management objectives include:

- consumers, My Aged Care contact centre staff (including screeners), assessors and service providers understand the new My Aged Care capabilities commencing from 1 July 2015;

- My Aged Care contact centre screeners and home support assessors have undertaken all required training prior to July 2015 and have received materials to support their ongoing interaction with the My Aged Care system;

- service providers have received materials to assist them to understand, and interact, with the new My Aged Care system from July 2015; and

- consumers understand where to go to find information about aged care services, and have access to information products to support the advice provided by My Aged Care.

A range of materials and mechanisms to support participant readiness to ensure My Aged Care’s success are outlined in section 8.2.
3. My Aged Care Users and Participants

3.1 Users
The following people are seen as users of My Aged Care:

- consumers: people without a client record;
- clients: people who have registered with My Aged Care and have a client record; and
- carers and representatives: people who may support or act on behalf of clients through nomination or legal authority. These people may also be consumers or clients themselves.

3.2 Participants
Other people or groups who use My Aged Care to provide services are referred to as participants.

Participants include:

- assessors: the My Aged Care Regional Assessment Service (RAS) and Aged Care Assessment Teams (ACATs);
- Commonwealth funded aged care service providers and their staff;
- Non-Commonwealth funded aged care service providers and their staff. Non-Commonwealth funded aged care services may include State, charitable, not for profit or privately funded aged care services; and
- healthcare providers, including general practitioners, primary care, acute care and other health professionals.

It should be noted that participants can also be classified as users depending upon the context in which they are interacting with My Aged Care. For example, an aged care service provider is typically classified as a participant in their own right, however, may on occasion make contact with My Aged Care on behalf of a client. In this instance, their role would be a My Aged Care user rather than participant.
4. My Aged Care – Client Pathways

This section describes how a client can interact with My Aged Care from July 2015:
4.1 **Inbound Referral**

My Aged Care contact centre staff receive inbound referrals from a range of users and participants e.g. health professionals. Having received an inbound referral, My Aged Care contact centre staff will act on the information, and contact the consumer to discuss their potential aged care needs.

4.2 **Enquiries**

My Aged Care contact centre staff provide consistent and relevant information on aged care. Contact centre staff record all contacts in the My Aged Care system for future reference and to enable accurate operational reporting and performance monitoring. Where relevant, this contact information will form part of a client’s record.

4.3 **Registration**

If a consumer is seeking assistance to access aged care services, contact centre staff will register the caller with My Aged Care and in doing so, establish a client record.

To establish a client record, key identity information needs to be provided including name, date of birth, and Medicare card number. This information will be matched with records held at the Department of Human Services to assist in verifying the client’s identity.

Additional information, such as the client’s contact information and carer and/or representative details may also be collected during the registration process.

The client record will hold the results of assessments and services provided, and will be updated over time. This information will be appropriately shared with assessor's and Commonwealth funded service providers to reduce the number of times clients need to retell their story.

Once registered, clients and representatives can view their information on the My Aged Care Client Portal through MyGov (the Commonwealth Government online services login). Clients and representatives can view and update personal and representative details, and see their interactions with My Aged Care, including calls to the contact centre, screening and assessment outcomes, and information about services received.

The registration process can be undertaken by assessors where a face-to-face setting is more appropriate. Service providers may also assist consumers to register over the phone.

Assessors or service providers will complete the registration process by sighting relevant documents to verify the client’s identity.

4.4 **Screening**

Conducted by My Aged Care contact centre staff via telephone, the purpose of screening is to understand a client’s needs in order to determine an appropriate pathway for them.

Screening occurs after registration and uses a series of questions to determine a client’s functional ability and includes indicators to determine whether the client has more complex needs. After screening, clients can be:

- provided with information, or given contact details of other services (such as non-Commonwealth funded aged care services) that may assist them; and/or
- matched and referred directly to a Commonwealth Home Support Programme (CHSP) service provider in their area; and/or
- referred to an assessment organisation for a face-to-face assessment of their needs.
The outcomes of screening are documented in an action plan. The action plan will be made available to the client for their reference via the My Aged Care Client Portal.

Screening is based on the National Assessment Framework that supports screening and assessment, promotes a wellness approach and builds on a person’s strengths and motivations. The Framework supports the consistent delivery of aged care screening and assessment across Australia.

As clients progress through screening, home support assessment and/or comprehensive assessment information is progressively captured in the client record. The National Screening and Assessment Form is designed so that the questions asked are appropriate to the setting (telephone or face-to-face) and skill of the person completing the screening/assessment, i.e. contact centre staff, a home support assessor or a comprehensive assessor.

4.5 Match and Refer

For Assessment

In consultation with the client, and based on the pathway and priority identified at screening, contact centre staff will identify a suitable assessment organisation (RAS or ACAT) and send an electronic referral. The assessment will be conducted in a timely manner, clients with urgent needs may be provided with temporary or interim services prior to assessment.

For Service

In consultation with the client, and based on the pathway identified at screening, contact centre staff will identify a suitable CHSP service provider based on the client’s needs and preferences. Clients can then choose to have an electronic referral sent to service providers in order of preference or broadcast to all available service providers. Alternatively, a client can be provided with a referral code that can be given to a service provider by the client.

Where a CHSP service is not available, the contact centre or client may use the service finders to locate other services.

4.6 Home Support Assessment

A home support assessment (conducted by the My Aged Care Regional Assessment Service) builds on the information provided by a client during screening. Home support assessments will be undertaken face-to-face with clients, and are generally conducted in the client’s home. The assessor will discuss reablement pathways, existing health conditions, financial and legal status, and carer status with the client (and carer/representative, if applicable). During the assessment, the assessor and client work together to establish a support plan that reflects the client’s strengths, goals/aspirations, and needs.

4.7 Comprehensive Assessment

A comprehensive assessment (conducted by an Aged Care Assessment Team) builds on the information provided by a client during screening and home support assessment (if applicable), and is undertaken face-to-face to determine a client’s eligibility for care types under the Aged Care Act 1997 (the Act). The recommendations for these care types are then subject to a decision by a Delegate to approve or not approve care under the Act. During the assessment, the assessor and client work together to establish a support plan that reflects the client’s strengths, goals/aspirations, and needs.
Following delegate approval, a client may be referred for a Home Care Package, Residential Care or Transition Care. Clients may also be referred to CHSP services where this is deemed appropriate.

4.8 Match and Refer for Service

**Match and Refer for Home Support and Aged Care Services (i.e. care under the Act)**

After the assessment has been completed, assessors will work with clients to match their assessed needs to suitable aged care services, and select their preferred service provider(s). For Commonwealth funded services, assessors will work with clients to select a referral method, i.e. an electronic referral in order of preference, an electronic referral broadcast to all available service providers, or a referral code that can be given to a service provider by the client. The assessor can also provide clients with contact details for non–Commonwealth funded services.

**Match for Other Services**

Where other services are appropriate, the assessor may assist the client to locate these services. This may include non-Commonwealth funded services.

4.9 Service Planning and Delivery

Commonwealth funded aged care service providers will be notified via email when a new referral is received, and log on to the My Aged Care Service Provider Portal to manage the referral.

After the service provider accepts a referral, they will contact the client to arrange delivery of services. Service providers will update the client record with information about the service being delivered, including date of commencement.

**Waitlist**

If the service provider is currently unable to provide services to the client, they are able to reject the referral with no further action, or reject the referral and indicate that they can place the client on to a waitlist for services. When services become available, a service provider can accept a client from a waitlist. In this situation, as the client has been accepted by a service provider, the client will be withdrawn from all other waitlists for that particular service.

**Non-Commonwealth funded aged care services**

Consumers and clients who are seeking services not funded by the Commonwealth can still seek assistance from My Aged Care to locate aged care services. They can call the My Aged Care contact centre or use the service finders on the My Aged Care website to locate non-Commonwealth funded aged care services and contact the provider(s) directly. It is the responsibility of service providers to guarantee the accuracy, currency or completeness of the service information listed on My Aged Care.

Information about a selection of non-Commonwealth funded services will be accessible via the service finders from July 2015. More information will become available as non-Commonwealth funded aged care services provide their information via a self-service portal that will be available from July 2015.

4.10 Monitor Client Care Needs

Service providers are able to request a reassessment of their client’s needs, if they feel like the services currently being provided are no longer appropriate. This may lead to an increase or
decrease in services as a result of the reassessment. In most instances, the assessment organisation that conducted the previous assessment of the client will be asked to undertake the reassessment.

The following diagram summarises client interactions with My Aged Care.
My Aged Care Client Interactions
An overview of how a Client interacts with My Aged Care.

Consumers
Any person who is seeking information about aged care: this includes clients, carers and representatives.

Providers
Service Providers, Healthcare Professionals, Community Groups, Charitable Organisations and Government (Local & State) that have a relationship with or assist clients and their representatives.

Carer / Representative
The older person may have a Carer or Representative who assists them and, in some cases, acts on their behalf.

Client
Once registered an older person becomes a Client.

Client Registration
A Client can register into the system by the My Aged Care Contact Centre staff to create a client record.

Assessment
Assessor to undertake the Assessment.

Assessment Organisation
An organisation engaged by the Commonwealth to conduct aged care assessments.

Assessor
Assessors undertake assessments in accordance with the national assessment framework.

Client Portal
Portal that allows Clients to view their client record including contact details, screening and assessment information, support plans and service information.

Service Provider
An organisation that is funded by the Commonwealth to provide aged care services for Clients.

Service Planning
The Client and Service Provider agree on how the services will be delivered.

Service Delivery
A summary of the service plan is recorded on the Client’s record and displayed via the Client portal.

Assessor Portal
Support Plan
An organisation engaged by the Commonwealth to conduct aged care assessments.

Service Referral
Electronic referral to a Commonwealth funded aged care service provider(s).

Service Information
A summary of the service plan is recorded on the Client’s record and displayed via the Client portal.
5. Assessor interactions with My Aged Care

5.1 Assessor interactions with My Aged Care

My Aged Care will enable assessors to undertake assessments in accordance with the new, National Assessment Framework. Assessors will be supported by a national assessment tool and their activities underpinned by web-based customer relationship management (CRM) processes and workflow.

An assessor will be able to use My Aged Care to:

- register their assessment organisation details and manage the registration of individual staff members;
- manage incoming referrals; and
- access the standardised National Screening and Assessment Form and record the outcomes, including the support plan, on the client record.

The following information describes the assessor experience as summarised in the assessor interactions diagram on page 19.

5.1.1 Enquiry

Assessment organisations can contact My Aged Care for information about aged care.

5.1.2 Registration

Assessment organisations are engaged by the Commonwealth Government to perform assessments as either a RAS (performing home support assessments) or ACAT (performing comprehensive assessments). A key contact for the organisation is then provided with a one-time activation code which enables access to the My Aged Care Assessor Portal through AUSkey (the Commonwealth Government’s online services login for businesses).

5.1.3 User administration

The assessment organisation’s key contact assumes the role of administrator for that organisation, and can set up accounts and access for other administrators, assessors, team leaders, delegates and other staff members. Each new account requires a one-time activation code to provide access to the My Aged Care Assessor Portal through AUSkey.

Staff members within the Organisation will use their AUSkey to log into the assessor portal each time they use the My Aged Care system.

5.1.4 Receive referral

All referrals for assessments are sent to the assessment organisation via the My Aged Care Assessor Portal. Upon receipt of a referral, the assessment organisation can access the full client record that contains information gathered during client registration, screening, and previous assessments (if applicable). This includes a priority rating to assist in managing assessor workloads and schedules.

After receipt of the referral, an available assessor is assigned to the client. In some cases, the referral may be sent to a different assessment organisation or back to the My Aged Care contact centre.
5.1.5 **Assessment**

An assessor arranges an appointment with the client at their home. The assessor may also gather information from other sources such as the client’s GP (with the consent of the client) or carers. The assessment itself is structured according to the National Assessment Framework, consisting of a standard assessment form and assessment tool (available through the My Aged Care Assessor Portal) which builds on the information captured in screening. The assessor will explore the client’s functional status, health conditions, carer arrangements, and other aspects of the client’s life that may impact what services they need and how they should be delivered.

5.1.6 **Support plan**

During and after the assessment, the assessor will have a discussion with the client to establish and document their strengths, goals and motivations in the form of a support plan. The plan also contains the agreed recommendations for aged care services that address the needs identified during the assessment. After completion of the plan, the assessor obtains the client’s acknowledgement of the plan and provides it to them for their reference. Clients can also view their support plan via the My Aged Care Client Portal.

5.1.7 **Match and refer**

If the client’s support plan contained recommendations for aged care services, the assessor helps the client identify service providers in their region. The service finder available on the My Aged Care Assessor Portal contains information on the service provider’s services, availability, price (if available) and specific services for people with diverse needs. Assessors may send referrals electronically to one or more service providers of the client’s choice, or provide the client with a referral code. The role of the assessor is complete when all referrals have been accepted, or when the client has made a choice not to proceed with aged care services, or to manage their own referrals.

The following diagram summarises assessor interactions with My Aged Care.
My Aged Care Assessor Interactions

An overview of how Assessors interact with My Aged Care.

Assessment Organisation
An organisation engaged by the Commonwealth to conduct Aged Care Assessments (RAS and ACATs).

Assessor
Assessors undertake assessments in accordance with the national assessment framework.

Assessor Staff
Staff who have access to the My Aged Care system to view referrals assigned by the Team Leader.

Administrator and Team Leader Roles
Administrator manages the Organisation's outlets and allocates staff access to the portal.
Team Leader accepts referrals and assigns them to individual staff who can then access the client's record and undertake assessment.

Assessment Referral
A request to conduct an Assessment of a Client is created by the My Aged Care Contact Centre and allocated to the Assessment Organisation.

Allocate Assessor
Team Leader or Administrator accepts the referral and allocates to an Assessor to conduct the Assessment.

Assessor
Assessors undertake assessments in accordance with the national assessment framework, using the National Screening and Assessment Form.

Support Plan
The Assessor and Client work together to establish a support plan that reflects the Client's needs, goals and preferences. The Assessor records this information in the client record.

Assessment and Support Plan
Assessment and Support Plan multichannel fax

Service Finder
Find services that meet the Client's needs using a national repository of aged care services.

Service Referral
Electronic referral to a Commonwealth Funded Service Provider.

Approval
Comprehensive assessments require a Delegate to review and approve the assessment when complete.

Assessment Outcome
Clients are notified with the outcome of the Assessment and this information is recorded in their client record.

Assessment Appointment
An appointment is arranged for the Assessor to undertake the assessment.

Assessors undertake assessments in accordance with the national assessment framework.

Administrator and Team Leader Roles
Administrator manages the Organisation's outlets and allocates staff access to the portal.
Team Leader accepts referrals and assigns them to individual staff who can then access the client's record and undertake assessment.

Assessment Referral
A request to conduct an Assessment of a Client is created by the My Aged Care Contact Centre and allocated to the Assessment Organisation.

Allocate Assessor
Team Leader or Administrator accepts the referral and allocates to an Assessor to conduct the Assessment.

Assessor
Assessors undertake assessments in accordance with the national assessment framework, using the National Screening and Assessment Form.

Support Plan
The Assessor and Client work together to establish a support plan that reflects the Client's needs, goals and preferences. The Assessor records this information in the client record.

Assessment and Support Plan
Assessment and Support Plan multichannel fax

Service Finder
Find services that meet the Client's needs using a national repository of aged care services.

Service Referral
Electronic referral to a Commonwealth Funded Service Provider.

Approval
Comprehensive assessments require a Delegate to review and approve the assessment when complete.

Assessment Outcome
Clients are notified with the outcome of the Assessment and this information is recorded in their client record.

Assessment Appointment
An appointment is arranged for the Assessor to undertake the assessment.

Assessors undertake assessments in accordance with the national assessment framework.

Administrator and Team Leader Roles
Administrator manages the Organisation's outlets and allocates staff access to the portal.
Team Leader accepts referrals and assigns them to individual staff who can then access the client's record and undertake assessment.

Assessment Referral
A request to conduct an Assessment of a Client is created by the My Aged Care Contact Centre and allocated to the Assessment Organisation.

Allocate Assessor
Team Leader or Administrator accepts the referral and allocates to an Assessor to conduct the Assessment.

Assessor
Assessors undertake assessments in accordance with the national assessment framework, using the National Screening and Assessment Form.

Support Plan
The Assessor and Client work together to establish a support plan that reflects the Client's needs, goals and preferences. The Assessor records this information in the client record.

Assessment and Support Plan
Assessment and Support Plan multichannel fax

Service Finder
Find services that meet the Client's needs using a national repository of aged care services.

Service Referral
Electronic referral to a Commonwealth Funded Service Provider.

Approval
Comprehensive assessments require a Delegate to review and approve the assessment when complete.

Assessment Outcome
Clients are notified with the outcome of the Assessment and this information is recorded in their client record.

Assessment Appointment
An appointment is arranged for the Assessor to undertake the assessment.

Assessors undertake assessments in accordance with the national assessment framework.

Administrator and Team Leader Roles
Administrator manages the Organisation's outlets and allocates staff access to the portal.
Team Leader accepts referrals and assigns them to individual staff who can then access the client's record and undertake assessment.

Assessment Referral
A request to conduct an Assessment of a Client is created by the My Aged Care Contact Centre and allocated to the Assessment Organisation.

Allocate Assessor
Team Leader or Administrator accepts the referral and allocates to an Assessor to conduct the Assessment.

Assessor
Assessors undertake assessments in accordance with the national assessment framework, using the National Screening and Assessment Form.

Support Plan
The Assessor and Client work together to establish a support plan that reflects the Client's needs, goals and preferences. The Assessor records this information in the client record.

Assessment and Support Plan
Assessment and Support Plan multichannel fax

Service Finder
Find services that meet the Client's needs using a national repository of aged care services.

Service Referral
Electronic referral to a Commonwealth Funded Service Provider.

Approval
Comprehensive assessments require a Delegate to review and approve the assessment when complete.

Assessment Outcome
Clients are notified with the outcome of the Assessment and this information is recorded in their client record.

Assessment Appointment
An appointment is arranged for the Assessor to undertake the assessment.

Assessors undertake assessments in accordance with the national assessment framework.

Administrator and Team Leader Roles
Administrator manages the Organisation's outlets and allocates staff access to the portal.
Team Leader accepts referrals and assigns them to individual staff who can then access the client's record and undertake assessment.

Assessment Referral
A request to conduct an Assessment of a Client is created by the My Aged Care Contact Centre and allocated to the Assessment Organisation.

Allocate Assessor
Team Leader or Administrator accepts the referral and allocates to an Assessor to conduct the Assessment.

Assessor
Assessors undertake assessments in accordance with the national assessment framework, using the National Screening and Assessment Form.

Support Plan
The Assessor and Client work together to establish a support plan that reflects the Client's needs, goals and preferences. The Assessor records this information in the client record.

Assessment and Support Plan
Assessment and Support Plan multichannel fax

Service Finder
Find services that meet the Client's needs using a national repository of aged care services.

Service Referral
Electronic referral to a Commonwealth Funded Service Provider.

Approval
Comprehensive assessments require a Delegate to review and approve the assessment when complete.

Assessment Outcome
Clients are notified with the outcome of the Assessment and this information is recorded in their client record.

Assessment Appointment
An appointment is arranged for the Assessor to undertake the assessment.

Assessors undertake assessments in accordance with the national assessment framework.

Administrator and Team Leader Roles
Administrator manages the Organisation's outlets and allocates staff access to the portal.
Team Leader accepts referrals and assigns them to individual staff who can then access the client's record and undertake assessment.

Assessment Referral
A request to conduct an Assessment of a Client is created by the My Aged Care Contact Centre and allocated to the Assessment Organisation.

Allocate Assessor
Team Leader or Administrator accepts the referral and allocates to an Assessor to conduct the Assessment.

Assessor
Assessors undertake assessments in accordance with the national assessment framework, using the National Screening and Assessment Form.

Support Plan
The Assessor and Client work together to establish a support plan that reflects the Client's needs, goals and preferences. The Assessor records this information in the client record.

Assessment and Support Plan
Assessment and Support Plan multichannel fax

Service Finder
Find services that meet the Client's needs using a national repository of aged care services.

Service Referral
Electronic referral to a Commonwealth Funded Service Provider.

Approval
Comprehensive assessments require a Delegate to review and approve the assessment when complete.

Assessment Outcome
Clients are notified with the outcome of the Assessment and this information is recorded in their client record.

Assessment Appointment
An appointment is arranged for the Assessor to undertake the assessment.

Assessors undertake assessments in accordance with the national assessment framework.
6. Service Provider interactions with My Aged Care

My Aged Care will enable both Commonwealth and non-Commonwealth funded aged care services to display service information on the My Aged Care website.

It is the responsibility of service providers to guarantee the accuracy, currency or completeness of the service information listed on My Aged Care.

My Aged Care contact centre staff and assessors can provide consumers and clients with information about Commonwealth and non-Commonwealth funded aged care services.

6.1 Commonwealth funded service provider interactions with My Aged Care

My Aged Care will allow service providers to have greater visibility of client care needs via the client record.

Commonwealth funded service providers will self-manage their service information via the My Aged Care service provider portal. Commonwealth funded service providers can include both their Commonwealth funded service information (including availability) and their non-Commonwealth funded service information. The service information will be displayed in the service finders from July 2015.

A service provider will have greater confidence that:

- the services they are providing are in response to identified care needs rather than because they have a service available;
- their view of client information is consistent with colleagues in the assessment workforce, is up to date, and trusted;
- referrals sent to them have been based on client choice, which is informed by the information about their organisation on the service finders;
- they will be able to have informed conversations about service planning with the client based on their support plan; and
- the client and their carer (or nominated representative) has greater visibility of their personal circumstances and assessment outcomes, which will make conversations with the client more focused and straightforward.

The following information describes the service provider experience as summarised in the service provider interactions diagram on page 22.

6.1.1 Enquiry

Service providers can contact My Aged Care for information about aged care.

6.1.2 Registration

Service providers are engaged by the Commonwealth Government to deliver aged care services. A key contact within the organisation is provided with a one-time activation code which allows access to the My Aged Care Service Provider Portal through AUSkey (the Commonwealth Government’s online services login for businesses).
### 6.1.3 User administration

The service provider’s key contact assumes the role of administrator for their organisation, and can set up accounts and access for other administrators and staff members, and establish service delivery outlets if the service provider delivers services in more than one location. Each new account will require a one-time activation code to provide access to the My Aged Care Service Provider Portal through AUSkey.

Staff members within the Organisation will use their AUSkey to log into the provider portal each time they use the *My Aged Care* system.

### 6.1.4 Receive referral

All referrals for services are sent to the service provider via the My Aged Care Service Provider Portal. Each referral enables access to the client’s record, and contains information gathered during client registration, screening and assessment, and importantly, the client’s agreed action or support plan. The referral also includes a priority rating to assist in prioritising the service provider’s response. The service provider may accept or reject the referral.

If the service provider is currently unable to provide services to the client, they are able to reject the referral with no further action, or reject the referral and indicate that they can place the client on to a waitlist for services. When services become available, a service provider can accept a client from a waitlist. In this situation, the client will be withdrawn from all other waitlists for that particular service.

Clients can contact service providers directly to arrange services. In this case, the client will have a referral code which enables access to their record and triggers a referral to the service provider.

### 6.1.5 Service Delivery

Once a referral is accepted, the service provider contacts the client to introduce themselves and arrange services. The service provider records the outcome of this discussion and agreement on the client’s record as service information, which includes the commencement date, review date, and end date. If the client’s needs change, the service provider may request a reassessment via the My Aged Care Service Provider Portal.

The following diagram summarises Commonwealth funded service provider interactions with My Aged Care.

### 6.2 Non-Commonwealth funded service providers

The My Aged Care contact centre and website can provide consumers and clients seeking aged care services with information about non-Commonwealth funded aged care services. Non-Commonwealth funded aged care services may include State, charitable, not for profit or privately funded aged care services.

Information about a selection of non-Commonwealth funded services will be accessible via the service finders from July 2015. More information will become available as non-Commonwealth funded aged care services provide their information via a self-service portal that will be available from July 2015.
My Aged Care Commonwealth Funded Service Provider Interactions

An overview of how a Commonwealth Funded Service Provider interacts with My Aged Care.

Service Provider

An organisation that is funded by the Commonwealth to provide aged care services for Clients.

Provider Staff

Staff who have access to the My Aged Care system to view referrals assigned by the Team Leader.

Service Referral

An electronic referral to a Service Provider.

Service Provider Initiated Contact

The Service Provider will receive an electronic referral that will give them access to the Client record. If the Service Provider accepts the referral they will initiate contact with the Client.

Alternate Referral or Reassessment

If the Client requires alternate or additional services, or reassessment they may be referred to the contact centre or the previous assessment organisation.

Client Initiated Contact

The Client can be provided with the contact details of Service Providers, and a referral code to give to their preferred provider. The referral code provides a means for the service provider to access the client record to assist the discussion and accept the referral.

Service Planning

The Client and Service Provider agree on how services will be delivered.

Service Delivery

Client is provided with services.

Enquiry

myagedcare.gov.au

Website that contains information about aged care. This site is publicly available and access is anonymous.

My Aged Care Contact Centre

Contact centre that assists with general enquires, registration, screening and referrals to services.

Portal Access and User Administration

Administrator and Team Leader Roles

Administrator manages the Organisation's outlets and allocates staff access to the portal.

Team Leader accepts referrals and assigns them to individual staff who can then access the client's record and arrange service delivery.

Provider Portal

Provider Portal (Login)

Provider Portal (User Management)

Data Entry

Add, Remove or Update Users

Administrator / Team Leader Roles

Administrator manages the Organisation's outlets and allocates staff access to the portal.

Team Leader accepts referrals and assigns them to individual staff who can then access the client's record and arrange service delivery.

DHS Systems

Department of Human Services (DHS) systems that manage aged care information.

Service Information

A summary of service information is recorded in the Client record.

Service Delivery

Client is provided with services.
7. My Aged Care Solution

7.1 Overview

The My Aged Care Operating Model is described in the following summary diagram.
Note: The link between the client record and Personally Controlled Electronic Health Record will not be established during Stage Two of My Aged Care.
7.2  **My Aged Care key components**

7.2.1  **Contact channels**

People reach the My Aged Care contact centre in a number of ways, including telephone, mail, email and web-form on the My Aged Care website. People may also contact the My Aged Care assessment workforce or directly approach service providers, who can provide information or refer the person to the My Aged Care contact centre for further assistance.

[Diagrams showing contact channels such as phone, mail, email, and computer]

7.2.2  **My Aged Care contact centre**

The My Aged Care contact centre is a key contact point for people who require general information or assistance with their aged care needs and any activities that may be required to fulfil those needs, including registration, screening, and referral.

My Aged Care contact centre staff will also provide basic IT support relating to the My Aged Care system to assessors and service providers.

7.2.3  **My Aged Care website**

The My Aged Care website:

- provides an online communication channel to the My Aged Care contact centre through web-forms;
- provides interactive online tools to help users navigate and understand the aged care system e.g. Fee Estimator;
- supports searchable Service Finders that provide access to information on aged care and related services by geographic area, price (if applicable), diverse needs, and other service attributes; and
- enables people to view and manage a range of My Aged Care information through secure portals.
7.3 **ICT solution objectives**

The rollout of the My Aged Care delivers an ICT solution that provides the following capabilities:

- client, assessor and service provider registration;
- records for clients, assessors and service providers;
- secure portals for clients, assessors and service providers;
- assessor and service provider access to client records;
- electronic referral;
- service matching;
- reporting capability;
- aged care screening form and tools; and
- aged care assessment form and tools.

The ICT solution is supported by connections to the Department of Human Services (DHS), including:

- authentication and identity verification processes for clients and representatives; and
- approvals for care under the *Aged Care Act 1997* to enable payments to be made to service providers under the Act. This mechanism replaces the former Aged Care Client Record (ACCR).

7.4 **Applications architecture**

7.4.1 **Overview**

For those people who are interested in the detail, this section describes the major application components that comprise the end-to-end solution, their functions and interactions.

7.4.2 **My Aged Care Customer Relationship Management (CRM)**

The primary application is the Siebel CRM application that provides My Aged Care staff with a system to manage and maintain aged care services delivered under My Aged Care. The CRM maintains a client record for aged care clients that contains their personal details and aged care history including, My Aged Care enquires, assessment, referrals and associated action, support and service plans. In addition, the CRM provides the core workflow processes for managing referrals for aged care assessments and services. The CRM calls other systems and services to authenticate and verify users, to search for services (funded and non-funded) and to undertake screening/assessment of aged care clients.
7.4.3 **Portals**

External portals are a core component of the solution and allow clients, assessors and service providers access to My Aged Care. These portals have been developed to provide each group of stakeholders with an accessible and usable interface.

Portals offer secure, web-based access to information and workflow functionality for authorised participants. The portals provide a way of meeting the needs of each key user and participant group, as outlined below:

- **Client portal**: clients can view their client record, view and update personal and representative details, and see their interactions with My Aged Care, including screening and assessment outcomes, plans and service information.

- **Assessor portal**: assessment organisations and their assessors can manage their organisation information, manage incoming referrals, perform client assessments online, match and refer for services and further assessment, communication and policy updates.

- **Service provider portal**: service providers can manage their organisation information (including what is presented on the My Aged Care website), manage incoming referrals, have secure access to client records, and access to administration tools online, enabling them to provide availability and other service information.

- **Contact centre portal**: My Aged Care contact centre staff have access to interactive online tools such as the fee estimator and service finders and CRM system. Using the CRM, staff can record and manage interactions, create and update client records, perform screening, and match and refer for aged care assessment and services.

- **Internal portal**: Departmental staff have secure access to My Aged Care for the purpose of operational reporting, performance monitoring, assurance, escalation and complaints management.
8. My Aged Care case studies

The following case studies further illustrate what My Aged Care will deliver by the end of Stage Two.

The case studies cover the following functions:

- Enquiries
- Registration and screening
- Aged care assessment
- Referral to aged care service
- Aged Care Service Provider service planning and delivery

The last four case studies are examples of how users may seek access to aged care services. The case studies have been documented and included in this document to help develop a common understanding with, and among, stakeholders. They provide a context for each experience and show the effect on those involved for each core function and key element of My Aged Care.
8.1 Enquiries

The My Aged Care contact centre and website provide easy-to-understand information on aged care services. My Aged Care is extensively advertised and is the identifiable and accessible entry point to aged care. There are a number of ways to contact My Aged Care – through telephone, web-form, fax and letter. Publications that explain the system are also available to help people have conversations about aged care. The My Aged Care contact centre staff are well-trained to help consumers navigate the system and understand their options.

8.1.1 Case Study - Eb and Jane are considering options for the future

Eb is an 83-year-old man who wants to keep living at home independently but feels it is becoming much harder since he lost his wife 6 months ago. Eb and his wife were co-dependant and assisted each other with day to day activities increasingly over the past 5 years. Eb is still grieving the loss of his wife and his only daughter Jane regularly visits to undertake the tasks previously completed by his wife. Jane has a young family and is becoming increasingly stressed with the caring role. Eb currently has no services to assist him and Jane is concerned that it may be difficult to access any services near their rural community. She is anxious about what the future may hold for her father.

8.1.1.1 Before My Aged Care

Eb and Jane start researching aged care options with an online search through Google. There are many different websites and services on offer, but they are not sure where to start. When they find websites run by government, the challenge then shifts to understanding what it means. They call a number of aged care information lines and eventually speak with someone who is warm but doesn’t fully understand what is required and cannot provide information that is relevant to their location. Jane is trying to remain emotionally strong but is feeling frustrated with the lack of clarity.

In the end they go through the local government aged care services guide and speak directly to various support services and service providers to obtain information on service options and their availability.

8.1.1.2 How My Aged Care will work

Jane helps Eb to call the My Aged Care contact centre. The 1800 number has been advertised as the ‘first port of call’ for all ageing and aged care needs. This telephone line has replaced all other Commonwealth Government funded aged care information lines making it easy to know where to go for help.

Well-informed My Aged Care staff listen to their concerns and offer information about the aged care system. As a result Jane and Eb feel confident in determining their next steps. They are offered printed information, but opt to access further details via the My Aged Care website because they can revisit specific subject areas they are interested in, and ensure the information they are reading is current. The website provides a wealth of information about services in their local area. There are a range of interactive tools (including service finders and fee estimators) to help them decide if they wish to take the next step in accessing other My Aged Care services. They can review and discuss future options in the privacy of their home.

8.1.1.3 Potential next steps for Eb and Jane

- Eb may register with My Aged Care for a client record
• Once registered, Eb may undergo screening and/or an assessment
• Eb may decide to seek home care assistance services to prolong his independence and give his daughter peace of mind
• Eb and Jane may consider longer-term options using information about services they have access via the website

8.2  Registration and screening

The first step to receiving Commonwealth funded aged care services is registration and screening. This can be undertaken during a single telephone call. Registration is the collection of basic identity information required to establish a unique client record. Over time the information within the client record will be added to, and include a person’s needs and services as they interact with My Aged Care and service providers. Following registration, the client is screened to determine the types of services that may be appropriate for them, and/or if a face-to-face assessment is required.

8.2.1  Case Study – Enid needs some basic support

Enid is a 79 year old woman who has been having difficulty with everyday tasks due to her arthritis and recent diagnosis of diabetes. She has particular difficulty with getting out of the house to visit her GP, pharmacy, and going shopping for groceries. Enid recognises and believes that eating fresh food, exercising and the ability to visit her doctor and pharmacist for advice on medication management is important for her health and quality of life. She is also not visiting her friends and family as much as she used to and is beginning to feel lonely and isolated. Enid has heard about other older people receiving aged care services but she assumes that she needs a doctor’s referral to get started.

8.2.1.1  Before My Aged Care

Enid eventually asks her doctor for some information on how to get help at home. Her doctor sends a referral onto a local provider requesting transport assistance for appointments and shopping. She hears back from the provider within a week, but they have a long waiting list and cannot help her for several months. She calls a senior support line for the details of other services, and finds another service provider who can do her shopping for her and help her prepare her meals. The service provider visits Enid and asks the same questions that the seniors support line asked her initially. They begin services within a week. Over time the service provider begins to be concerned that Enid needs further help to lessen her isolation and loneliness, and arranges for a referral to a local centre based day care. This new provider also asks Enid to fill in forms with her details, and visits her initially to assess her needs before she attends the centre.

8.2.1.2  How My Aged Care will work

Enid eventually asks her doctor for some information on how to get help at home. Her doctor sends a referral via a web-form to My Aged Care. Within a few days, a person from My Aged Care contacts Enid about her situation. After a discussion about the options for aged care services, they confirm and gain consent from Enid to register her details with My Aged Care and undertake a brief telephone screening to determine what services could meet her needs. The My Aged Care staff member determines that some transport services will help Enid address many of her health concerns and help her remain connected with her family and friends. They arrange for a referral to
be sent to some local service providers. This referral is accepted by a service provider with availability, and services commence shortly after.

There is no need for the provider to collect more information about Enid as her details are up to date and available via the client record accessed from the Service Provider Portal. Over time, the service provider becomes concerned that Enid needs further help, and contacts My Aged Care to arrange a more holistic assessment of her needs. This assessment is based on the information captured at first contact with Enid, and supplemented by information recorded by the service provider about her care.

8.2.1.3 Potential next steps for Enid

- Enid may be referred back to My Aged Care for an reassessment of her needs
- Once assessed, Enid and the assessor develop a support plan to identify her goals
- The support plan may contain a mix of strategies and aged care services to help achieve her goals

8.3 Aged care assessment

After screening, many clients will be referred for a face-to-face assessment of their needs. Clients with high needs or with limited supports are referred to a clinically-based comprehensive assessment for services under the Aged Care Act 1997, while other clients undergo a home support assessment by the RAS. During assessment (both RAS and ACAT), a support plan will be developed and the client will be encouraged to establish goals and develop strategies to help overcome difficulties in managing activities of everyday life. Assessors will also recommend aged care services and supports that help achieve the client’s goals.

8.3.1 Case Study – Ioannis and Elizabeth are looking for help

Ioannis and Elizabeth are an older couple who have been caring for each other for quite some time. Elizabeth has a long-term back injury that confines her to a wheelchair, requires multiple medications and has led to obesity. Ioannis helps Elizabeth get in and out of her wheelchair, he bathes her and drives her to doctor’s appointments. Their daughter Ros helps with the cooking and cleaning, but she has a full time job and young children to care for. Recently Ioannis has been having some difficulties lifting Elizabeth so she sometimes spends the whole day in bed and is developing pressure areas. The stress of caring for his wife is beginning to affect Ioannis’s mood, and he sometimes has difficulty remembering which medications to give Elizabeth. He knows that he needs help but he doesn’t know where to start. Staying together is very important to Ioannis and Elizabeth.

8.3.1.1 Before My Aged Care

Ros notices that her father is beginning to struggle with his caring responsibilities, and spends some time on the web to find out what support may be available for her mother. She reads information about what an Aged Care Assessment Team does and calls the local team. An assessment is scheduled after an initial intake conversation. The assessor visits Ioannis and Elizabeth and immediately recognises that Ioannis also needs some help. The assessor is able to rearrange their day so that Ioannis is assessed with Elizabeth.
The assessor uses information collected from Ioannis, Elizabeth, Ros and their GP to recommend that approval for Home Care Package level 3-4 for Elizabeth, and approval for Residential Respite for both of them is appropriate. The assessor manually records their findings and obtains approval from a delegate to formalise the recommendations and approve Ioannis and Elizabeth for care.

8.3.1.2 How My Aged Care will work

Ros notices that her father is beginning to struggle with his caring responsibilities, and spends some time on the My Aged Care website to find out what support may be available for her parents. She reads about the various levels of support and calls the My Aged Care contact centre. After registration, Ioannis and Elizabeth undergo screening over the telephone, which collects some initial needs information and determines that a comprehensive assessment for both Elizabeth and Ioannis is required. The contact centre sends referrals to the local Assessment Care Assessment Team, who accept the referrals and assigns an assessor to undertake the assessments at the same time. The assessor makes contact and arranges for both assessments to be undertaken together in their home.

Building on the information provided during screening, the assessor uses the National Screening and Assessment Form and supplementary tools to collect and record information from Ioannis, Elizabeth, Ros and their GP to determine that approval for Home Care Package level 3-4 for Elizabeth, and approval for Residential Respite for both of them is appropriate. These findings are captured on the system within Elizabeth’s and Ioannis’ support plans. In addition to these recommendations, the assessor establishes goals, strengths and motivations and helps Ioannis and Elizabeth establish strategies to achieve their goals. The support plan and assessment is then sent to a delegate to formalise the recommendations and approve Ioannis and Elizabeth for care.

8.3.1.3 Potential next steps for Ioannis and Elizabeth

- Ioannis and Elizabeth work with the assessor to find local providers and request a referral for a Home Care Package
- Ioannis and Elizabeth work with the assessor to identify local aged care homes for residential respite

8.4 Refer to aged care service

Following screening or assessment, clients will be referred to service providers who are able to provide the services they require in their local area. Clients have choice and control over where their information is sent and are given a range of options to help decide on, and connect with, service providers.

8.4.1 Case Study - Ioannis and Elizabeth (continued)

Ioannis and Elizabeth (Case Study 7.3) have been assessed together. Ioannis and Elizabeth have both been approved for residential respite and Elizabeth has been approved for a Home Care Package 3-4. Ioannis is looking for a Home Care Package provider to help them immediately, and he does not have strong preferences about which service provider to go with – he needs help now. However, he also wants to find a suitable aged care home for Elizabeth for respite. He is particularly concerned with finding a home that both he and Elizabeth can move in to together if her needs increase, which means finding a home that is affordable and offers a focus on Greek residents and their needs.
8.4.1.1 Before My Aged Care

After their approval, Ioannis and Elizabeth are given a short list of available home care and residential care providers. They call each provider to find out more about them, enquire if they are available, and if not, place their name on a waitlist. There may be other providers in their region; but if they are not included in the list they may not know about them. There is no central record of which providers they have contacted and no easy way to tell if the provider is available.

Eventually, Elizabeth is placed on a several waitlists for a Home Care Package. They need to call back each service provider to check on their progress through the waitlist. When a service becomes available, the service provider contacts Ioannis or Elizabeth to arrange services, but this does not remove them from other waitlists.

While Ioannis and Elizabeth found some facilities for residential respite, they are not able to easily compare prices between the aged care homes, which makes it difficult for Ioannis and Elizabeth to make their decision.

8.4.1.2 How My Aged Care will work

After their approval, the assessor works with Ioannis and Elizabeth to search for, and refer to, aged care providers in their region. As they need a Home Care Package right away, the assessor focuses the search on available home care package providers, and sends a broadcast referral to those providers. If they have services available, a provider will accept the referral, and other service providers will no longer be able to view the referral. Services will commence straight away. If there are no packages available, service providers can accept Elizabeth to their waitlists. When a package becomes available, the service provider draws Elizabeth’s referral from the waitlist.

Because Elizabeth does not need residential respite right away, Ioannis chooses to spend more time researching aged care homes that meet their requirements. The assessor helps him familiarise himself with the service finder on the My Aged Care website, and gives him a referral code that allows his chosen provider to access his and Elizabeth’s records and commence providing services. Ioannis uses the service finder on the website to find aged care homes that provide respite in their region, and narrows the search to focus on service providers that have services for older Greek people. He also uses the fee estimator to get an estimate on what he may be asked to pay for permanent residential care, and uses that estimate to filter out providers that are not within their price range.

8.4.1.3 Potential next steps for Ioannis and Elizabeth

- Elizabeth is provided with a Home Care Package immediately or after a period of time on a central waitlist
- Ioannis and Elizabeth make their decision about their preferred aged care home
- After selecting an aged care home, Ioannis contacts the provider with his referral code, or contacts My Aged Care to arrange a referral

8.5 Aged care service provider service planning and delivery

Service providers have access to the My Aged Care Service Provider Portal to maintain information about the services they provide, receive referrals for service, and provide information on the care they provide to clients. This information enriches the client record over time, and because the
record is centrally managed, service providers spend less time collecting and maintaining information for their clients.

8.5.1 Case Study – Ace’s Home Support receive a referral

After screening and registration, Enid (case study 7.2) has been matched and referred to Ace’s Home Support who provide transport services and some social support. Ace’s Home Support is locally situated close to Enid. The office is run by an administrator, Ellen, who manages intake and scheduling, and a support worker, Raj, who drives their van and organises home visits for volunteers and group social activities.

8.5.1.1 Before My Aged Care

Ace’s Home Support has developed brochures to promote their services in order to attract Enid’s referral for their Commonwealth government-funded services. Ellen also operates an intake telephone line and has developed a referral form which is used to determine if they can or will accept clients.

After intake, Ellen and Raj spend a considerable amount of time assessing Enid’s needs to develop a plan for her and to determine if referral for additional services is required. Enid gets frustrated at having to repeat her story and undergo an assessment, and Raj suspects that they have not got Enid’s complete information. In some cases, clients are receiving multiple or duplicative services from other providers without their knowledge. For Enid, Raj is the only person she sees on a regular basis, and there is lot of pressure on Raj to provide informal supports and monitoring. When Enid’s needs change Ellen and Raj rely on local knowledge and networks to make referrals for further services.

8.5.1.2 How My Aged Care will work

Ace’s Home Support have updated their information via the My Aged Care Service Provider Portal, including information on the services they provide, their location, contact details, and their availability. When the My Aged Care contact centre sends Enid’s referral, Ellen is notified via email with a link to view her details on the Portal. She views Enid’s aged care needs information, including the details of the telephone screening, and chooses to accept Enid to their service.

Ellen has confidence that the information about Enid is complete and up-to-date. When she contacts Enid, she knows that Enid is expecting the call and has a basic understanding of what services can be provided. Enid’s client record will show if she is receiving other services, and if she has a support plan, Ellen and Raj will be able to view her goals and areas of concern, which helps them work with Enid to make a difference to her quality of life. If Enid’s needs change, Ellen or Raj can request a review or reassessment via the portal.

If Ace’s Home Support do not have availability or are unable to provide services to Enid, Ellen can reject the referral and, if necessary update their availability information on the portal.

8.5.1.3 Potential next steps for Ace’s Home Support

- Ace’s Home Support update Enid’s record with a summary of the care plan
- If Enid’s needs change, request a reassessment of her needs
- If services cease, update Enid’s record
9. My Aged Care Rollout and Readiness Activities

9.1 Rollout

As highlighted in section 2.5.2, the introduction of Stage Two of My Aged Care will commence in April 2015 within one region in Victoria. This will be followed by the commencement of the national rollout of Stage Two in July 2015 with the introduction of the client record, screening, home support assessment and match and refer capabilities. When all Aged Care Assessment Teams are completing comprehensive assessments via the My Aged Care system, Stage Two will be considered complete.

9.2 Readiness Activities

As outlined in section 2.7, the transition planning to support the sector to prepare for Stage Two has been segmented into five stages. Each phase focuses on increasing levels of awareness, and acceptance, of the changes that will take place with the introduction of the next stage of My Aged Care.

The following outlines when support material and mechanisms to support participant readiness will become available.

**Stage 1: Internal preparation, September – December 2014**
- Internal focus on preparing support material

**Stage 2: Make People Aware, January to March 2015**
- National roadshows
- *My Aged Care* portal set up factsheets
- FAQs

**Stage 3: Prepare People, April to Mid-June 2015**
- National roadshows
- *My Aged Care* webinars (live and on demand)
- Detailed User and System Guides
- Quick System Reference Guides
- Readiness Checklists
- Videos
- Additional FAQs
- Training for assessors
- *My Aged Care* system support commences

**Stage 4: People are Ready, Mid June to 30 June 2015**
- Additional FAQs
- *My Aged Care* system support continues

**Stage 5: People are using the system, 1 July 2015 onwards.**
- Additional FAQs
- *My Aged Care* system support continues