Transitioning *to the new* In-Home Aged Care program

Workbook for Providers
(as of 29 February 2024)

Your Side

'Reaching and Supporting Many'
 - artwork by Mayi woman Leah Cummins

We acknowledge the Traditional Custodians of the lands where we live and work today – the Cammeraygal people. We pay our respect to Elders past and present, and thank them for nurturing and protecting the waterways, the environment, and the ecosystems for thousands of generations. In recognising Aboriginal and Torres Strait Islander people's cultures as the longest living continuous cultures, we learn to care for country, care for culture and care for each other.

YourSide

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1. Purpose of Document

The In-Home Aged Care program workbook for Providers is aimed at supporting service providers (particularly those providing CHSP services) to undertake a reflective process regarding the new In-Home Aged Care program and what it means for their organisation.

Organised by themes, this workbook includes a series of questions that will encourage organisations to consider the different implications of the new program on their organisation. The questions are designed to elicit discussion and reflection with intent to create an action plan that will help organisations transition to the new system. It does not provide any definitive direction or answer.

2. Target Audience

This workbook has been designed for senior managers, leaders, Committee and Board members of organisations that currently deliver Commonwealth Home Support Program (CHSP), Home Care Packages (HCP) and/or Short Term Restorative Care (STRC).

It can also be used by organisations that are considering entering the Aged Care market and become a registered provider.

Note: 'registered provider' refers to service providers who are registered to provide Government subsidised services. Details about registration of providers are available in this [Consultation Paper 'A new model for regulating aged care' (April 2023)](#).

3. Learning Outcomes and Objectives

The workbook may provide the basis for stakeholders to discuss, think critically and creatively, and consider solutions and ideas to apply to their organisation in the short to medium term. Each organisation will end up with their unique set of actions based on their unique circumstances.

This process will not be linear and may take several weeks or months. It should support organisations to:

- Decide whether they will transition to the new In-Home Aged Care program and become a registered provider.
- Increase their understanding about the implications of the new program in key areas of the organisation.
- Increase their understanding about level of preparedness of the organisation in relation to the transition to the new program and which areas the Executive Leadership Team (ELT) and Board should focus on.
- Develop a consolidated action plan (or similar) specific to the organisation to prepare for the transition.

4. Design process

This workbook was developed in response to Aged Care providers' feedback on the challenges and barriers that they are encountering in preparation for the reforms.

The development process of this workbook was driven by the acknowledgement that there is a gap in the type of resources that are currently available to the Sector. There is currently no tool that provides a reflective framework for providers to evaluate their organisation's positioning and level of preparedness in relation to the new In-Home Aged Care program. Additionally, there is no centralised source of information where service providers can find summarised information about how the different components of the new program relate to each other. Service providers currently need to extract information from various Government agencies' websites, consultation papers, webinars, or legislative texts.

Based on the key reform areas announced by the Government, a decision was made to focus on 5 interconnected areas that form an integral part of any service provider's business: *Governance and Key Personnel, People and Workforce, Consumers, Business and Service Model, and Backoffice and Corporate Services*.

The design process was iterative and required several months of research and feedback before it was finalised. It is intended that it will be reviewed at least every month to ensure it incorporates the latest information by the Department of Health and Aged Care and other official stakeholders. An up-to-date version of this workbook will be uploaded monthly on Your Side Sector Support website and will replace the preceding version.

5. Acknowledgement and disclaimer

While this document has been developed with the greatest care, it is designed as a guide only and is not intended as a substitute for professional advice. Your Side SSD gives no warranty, assurance, or representation, and accepts no responsibility or liability for the correctness, accuracy, completeness, or currency of this publication or any of the information in it, or that it is suitable for your intended use. Please always refer to the official website of the Australian Government Department of Health and Aged Care's website for the most up to date and accurate information about the new program.

6. How to use this workbook?

First, we recommend you **immerse yourself in the available information about the new In-Home Aged Care program** before responding to the questions. The key resources referred to in the next section could be a starting point.

Secondly, **we suggest you tackle 'The Big Questions'**. These are fundamental questions and might require some consultation and discussion within the different leadership teams/committees. If you determine that the organisation will become a registered provider in the new In-Home Aged Care program, you can then go to the next section.

Thirdly, we suggest you **work through the 'Follow-up Questions' theme by theme, starting first with Governance & Key Personnel.** You can amend/add any question to meet your organisation's needs. Feel free to add any comments and try to add one action or comment per line item. You may choose to set up different meetings to explore each theme, invite particular people to provide specific input, e.g., Finance, HR, IT managers.

When you have responded to all the questions, you will be able to understand your organisation's level of preparedness for each of the themes. We encourage you to **transfer all your comments/actions from the tables into a consolidated action plan.**

We welcome feedback and suggestions about this resource. Please contact the Sector Support team at sectorsupport@yourside.org.au or complete our feedback form here.

7. In-Home Aged Care Program Overview

The Support at Home Program was introduced in May 2021 by the Government as a response to the Royal Commission into Aged Care Quality & Safety Final Report. The Royal Commission Final Report described a series of systemic issues which require Sector-wide reforms. It is to be noted that the Government has been referring to a new 'In-Home Aged Care program' and 'Support at Home' program' interchangeably. The new Aged Care system will commence in July 2025.

The new In-Home Aged Care program requires providers to transition to a new system where **Aged Care will be assessed, funded and regulated differently**. Therefore, Aged Care service providers will need to consider how the new program will affect every aspect of their current business, e.g., systems, processes, workforce, governance, Board, training, finances, customer care, business model, technology etc.

Key resources from the Department of Health and Aged Care are:

New Aged Care Act

- [About the new Aged Care Act (December 2023)](#)
- [What the new Aged Care Act may mean for you (December 2023)](#)
- [A new Aged Care Act: exposure draft – Consultation paper no. 2 (December 2023)](#)
- [A new Aged Care Act: exposure draft – Consultation paper no. 2 summary – Plain English version (December 2023)](#)
- [The new Aged Care Act – What's new? What's different? (December 2023)](#)
- [Aged care system governance under the draft new Aged Care Act (December 2023)](#)
- [Making a nominee arrangement under the draft new Aged Care Act (December 2023)](#)
- [Who will be able to access aged care under the draft new Aged Care Act (December 2023)](#)
- [A stronger aged care regulator under the draft new Aged Care Act (December 2023)](#)
- [A rights-based approach under the draft new Aged Care Act (December 2023)](#)
- [Upholding the rights of older people under the draft new Aged Care Act (December 2023)](#)
- [Aged care services model under the draft new Aged Care Act (December 2023)](#)
- [Whistleblower protections under the draft new Aged Care Act (December 2023)](#)
- [Webinar New Aged Care Act and Support at Home program update (December 2023)](#)
- [Phases of aged care reform (December 2023)](#)
- [Aged Care Reform Roadmap (released June 2023)](#)
- [CHSP provider update – 2023-24 Extension (December 2022)](#)

Strengthened Quality Standards – Note: these are currently open for public consultation until 30 April 2024 and may be further refined and updated. While that's' the case, these are helpful materials for providers.

- [Strengthened Aged Care Quality Standards Final Draft (November 2023)](#)

- [Draft guidance for providers:](#)
    - [Introduction (February 2024)](#)
    - [Standard 1: The Person (February 2024)](#)
    - [Standard 2: The Organisation (February 2024)](#)
    - [Standard 3: Care and Services (February 2024)](#)
    - [Standard 4: The Environment (February 2024)](#)
    - [Standard 5: Clinical Care (February 2024)](#)
    - [Standard 6: Food and Nutrition (February 2024)](#)
    - [Standard 7: The Residential Community (February 2024)](#)

- [Draft audit methodology (February 2024)](#)
- [Draft evidence mapping framework (February 2024)](#)
- [Draft guidance for aged care workers (February 2024)](#)
- [Draft pre-audit preparation tool (February 2024)](#)
- [Draft request for Information template - category 4 & 5 (February 2024)](#)
- [Draft request for Information template - category 6 (February 2024)](#)
- [Glossary (February 2024)](#)
- [Framework analysis](#)(Provided for information, not for review) [(February 2024)](#)

A range of other resources is available at the end of this document.

8. Looking inwards: the Big Questions

Do you have the [Willingness](#) and the [Capacity](#) to become a registered provider under the new In-Home Aged Care program?

The details of the new program are still being decided as the Department of Health and Aged Care consults with various stakeholders. This means that providers will continue to learn about the new program in stages, with an expectation that they will incorporate and adapt for those changes as they receive more information.

Consider the following questions:

> **a) Do you want to transition to the new In-Home Aged Care program?**
>   **Do the reforms align with your organisation's purpose and vision?**

For some, the response to this question will be a clear 'yes'. For others there may be reluctance and unease. If it is the case, it is worth taking a moment to think about the reasons for this.
Is it attributed to fear for change, retaining the organisation's legacy, discomfort, financial capital or is it because the new In-Home Aged Care program does not align with the organisation's purpose and values?

> **b)   Do you have some elements in place to transition to the new program?**

This question is about your organisation's capacity to transition to the new program. This is not to say that you should have all the responses now. It is more about knowing that the organisation has *some* elements in place to facilitate this transition, such as a positive workplace environment and culture, trust in each other, a strong Executive Leadership Team (ELT), relatively integrated IT systems, established governance processes. It also relates to the Executive Leadership Team's awareness about the organisation's strengths and areas of improvement.

As a Board and Management group, consider, do you have the required energy, commitment, and risk appetite to both operate as business as usual with current funding, while also transforming your operating model? This may be equal to two full time jobs.

Has the Board made a commitment to invest in the transformation?

→ **IF the response leans towards YES:** go to the next section (9. Follow-Up Questions).

→ **IF the response is UNSURE**: Perhaps it is a good time to call for a meeting with your organisation's Board and Executive Leadership Team to address these key questions.

→ **IF the response leans towards NO**:

- Find another way to develop on purpose. This may mean cease to deliver direct Aged Care services and contribute to the Sector in a different way. It may also mean reinvesting capital into another organisation that serves your purpose.
- Merge. Another organisation may have the capability to support your purpose and a merger may be a good option for sustaining purpose.
- Exit the market. Sometimes a positive exit is the best alternative. How does it look like for your organisation? Think about continuity of care for your existing clients, communication with your staff, etc.

9. Follow-Up Questions

This series of questions is not exhaustive, and we strongly recommend you add/tailor these questions to your specific circumstances.

How to work through these tables:

1. Work through the questions theme by theme. Governance and Key Personnel should be the first theme you explore.
2. Put a tick in the column that applies to you and try to add one action/comment for each item.
3. Add/amend the questions as required. If you add a new question, it must be positively worded to fit this table's coding system, e.g. 'Our systems are efficient', as opposed to 'Our systems are not very efficient'.

An Excel spreadsheet including all the Follow-up questions has been developed to complement this Workbook. It should facilitate the customisation of the questions and includes an interactive dashboard. It can be downloaded **here**.

a. Governance & Key Personnel

Key elements of the new program:
- A new Aged Care Act to be introduced in early 2024 (expected to pass Parliament and come into effect from 1 July 2024), along with a new Regulatory Framework for Aged Care.
- New Aged Care Act will focus on older people, rather than aged care providers.
- All services delivered in residential Aged Care, HCP, CHSP, MPS and NATSIFACP, TCP, Short-Term Restorative Care program and Innovative Care Program will be required to register into one or more registration categories.
- Provider responsibilities will be based on the risk level and the registration category of the service provider. Note: this will see a shift from 'approved' providers to 'registered' providers in the new regulatory model.
- Registration categories based on grouping services with similar characteristics and level of risks in their delivery – see Table below (extract below from DoHAC Webinar 14 December 2023, slide 18):

Final proposed registration categories

*The Aged Care service list has been adjusted resulting in some service types being renamed or removed until commencement of the Support at Home

Category	Description	Service types	Provider Obligations	Aged Care Quality standards – Core 1-4	Aged care quality standards modules 5-7
Category 1	Home and community services	• Domestic assistance • Home maintenance and repairs • Meals and nutrition • Transport	✓		
Category 2	Assistive technology and home modifications	• Goods, equipment and assistive technologies (non-digital) • Home modifications	✓		
Category 3	Advisory services	• Care management (basic) • Assistance with care and housing • Specialised supports	✓		
Category 4	Personal and Social care in the home and community (including respite)	• Transition care services • Allied health • Personal Care • Social support and community engagement • Flexible, Centre based and cottage respite	✓	Standard 1: The Person Standard 2: The Organisation ✓ Standard 3: The Care and Services Standard 4: The Environment	
Category 5	Nursing and complex care management	• Nursing • Care management (complex)	✓	Standard 1: The Person Standard 2: The Organisation ✓ Standard 3: The Care and Services Standard 4: The Environment	Standard 5: Clinical Care ✓
Category 6	Residential care	• Accommodation services • Care and services • Residential respite	✓	Standard 1: The Person Standard 2: The Organisation ✓ Standard 3: The Care and Services Standard 4: The Environment	Standard 5: Clinical Care Standard 6: Food and Nutrition ✓ Standard 7: The Residential Community

- Minimum requirements will apply to all providers (core requirement), such as a Code of Conduct.
- Category-specific requirements will also apply to all providers, and Quality Standards will apply to providers of specific registration categories, currently applicable to Categories 4 to 6 (see Table above).
- Provider-specific requirements may also apply based on risks identified within an individual service provider.
- Serious Incident Response Scheme (SIRS) to apply to HCP, CHSP and flexible care services (from 1 December 2022).

Guidance resources for the strengthened Quality Standards
- In February 2024, the Aged Care Quality and Safety Commission have released for public feedback, Guidance resources to its draft strengthened Quality Standards.
- These strengthened Quality Standards will activate when the new Aged Care Act comes into effect (the current date is 1 July 2024).
- The below Guidance resources are aimed at supporting aged care providers confirm whether they are on track to meeting the strengthened Quality Standards.
- Although public feedback will be used to improve and update these Guidance resources after 30 April 2024, providers should start using these resources now, to assess and support compliance planning.

- [Strengthened Aged Care Quality Standards Final Draft (November 2023)](#)

- [Draft guidance for providers:](#)
  - [Introduction (February 2024)](#)
  - [Standard 1: The Person (February 2024)](#)
  - [Standard 2: The Organisation (February 2024)](#)
  - [Standard 3: Care and Services (February 2024)](#)
  - [Standard 4: The Environment (February 2024)](#)
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- [Draft audit methodology (February 2024)](#)
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- [Framework analysis](#)(Provided for information, not for review) [(February 2024)](#)

For Approved Providers only*:

- Code of Conduct to apply to Approved Providers, their governing persons and workers, volunteers and (sub)contractors (from 1 December 2022).
- Assess the suitability of their key personnel at least once a year (from 1 December 2022).
- Providers are required to report material changes relating to themselves, and their key personnel within 14 days of the change occurring (from 1 December 2022).
- If requested to provide information about the suitability of key personnel by the Commission, providers must provide the information within 28 days (from 1 December 2022).
- Report annually on operations (from 1 December 2022).

- Meet new requirements regarding membership of provider governing bodies: majority of independent non-executive members and at least one member with experience with the provision of clinical care (from 1 December 2022). *Existing providers have until 1 December 2023 to comply.*
- Establishment of a Quality Care Advisory Body that will give the governing body a written report about the quality of care, every six months (from 1 December 2022). *Existing providers have until 1 December 2023 to comply.*
- Establishment of a Consumer Advisory Body to offer consumers and representatives the opportunity to establish one or more consumer advisory bodies each year (from 1 December 2022). *Existing providers have until 1 December 2023 to comply.*
- Meet record keeping requirements: information about governing body, Quality Care Advisory Body, Consumer Advisory Body and skills, qualifications, or experience of staff members (from 1 December 2022). *Existing providers have until 1 December 2023 to comply.*
- Changes to sharing information about providers' operations: additional information about operations to be published on My Aged Care by 31 October each year for the previous financial year, covering a statement of compliance, diversity, feedback and complaints, key improvements, the provider's executive and governing body membership. This information will be submitted online through a collection form. [Government Provider Management System – User Guide: Provider Operations Reporting](#)).

While these requirements are applicable to Approved Providers under the Aged Care Act only, it is expected that similar provisions will be extended to all Commonwealth-funded aged care services as part of the planned introduction of a new Aged Care Act (anticipated date of effect from July 2024, to be confirmed). This includes CHSP and NATSIFACP service providers. These provisions may apply to certain service categories.

To read more about Governance & Key Personnel:

- [Government Provider Management System – User Guide: Provider Operations Reporting](#) (November 2023)
- [Code of Conduct for Aged Care – information for providers](#)
- [SIRS in home services - information and decision support tool](#)
- [Strengthening provider governance - information](#)
- [Guidance and resources for providers to support the Aged Care Quality Standards (August 2023)](#)
- [Tips for starting on the New Quality Standards (February 2024)](#)

Considerations	Yes	Unsure	No	Actions and Comments
Have you completed a Skills Needs Analysis of your Board and Executive Leadership Team (ELT)?				
Do you have the right skillsets in the Board, the ELT, and across the organisation? You may refer to the suitability criteria of Key Personnel (currently applicable to Approved Providers) for guidance.				
Serious Incident Response Scheme (SIRS): have you conducted a gap analysis and understand where your organisation needs to focus on (system, education of staff, etc)?				
Have your Board and Executive team had any conversations about what a risk based regulatory framework means for the organisation (application requirements and ongoing responsibilities)?				
If applicable (currently applies to Approved Providers under the Aged Care Act only):				
Does your governing body meet the new requirements? (e.g., majority needs to be independent non-executive, at least one member has experience in clinical care)? * Exceptions apply to these requirements.				
Code of Conduct: have you updated your internal policies (staff and Board of Directors Code of Conduct/induction processes/recruitment) so that it is incorporated?				

Code of Conduct: do you have systems/records in place to demonstrate you are compliant to the Code and your staff are regularly trained or informed about it?				
If subcontracting, do you have systems in place to demonstrate that your sub-contractors are also compliant?				
Have you identified what roles are considered Key Personnel (KP) in your organisation?				
Do you have systems in place to assess suitability of Key Personnel annually and inform the Commission of any changes within 14 days? Do Key Personnel understand their roles and responsibilities?				
Have you started conversations about establishing the Quality Care Advisory Body and Consumer Advisory Body? Think about keeping a record of these discussions and any decision made, as well as any communication with external stakeholders (e.g. offer made to care recipients and their representatives to establish a Consumer Advisory Body).				
Do you have a secure system to record information about all of the above (membership of various groups, meeting minutes, staff qualifications, skills and experience)?				

b. People & Workforce

Key elements of the new program:

- It is the Provider's responsibility that staff have appropriate skills, qualifications, experience to provide care/services, and are given the opportunity to develop their capacity to provide these services.
- New regulatory framework will be risk proportionate. Therefore, depending on registration category of provider, staff will be subject to specific requirements in relation to education, standards, assessment and reporting/enforcement actions and penalties/vigilance activities (e.g., incidents and complaints).
- Extension of the Serious Incident Response Scheme (SIRS) to home care, including CHSP.
- New Aged Care Register of banning orders that service providers need to consult when hiring new staff.
- Establishment of a National Worker Registration Scheme for Aged care to make sure that workers are suitable to deliver services and care in the aged care sector.
- Introduction and enforcement of a Code of Conduct for workforce and governing persons (applicable to Approved Providers from 1 December 2022).

To read more about People and Workforce:
- Read this article: Your workforce: where do you want it to be?
- What drives your workforce culture? - Change Factory
- Quality Jobs Quality Care - Workforce Toolkit
- Attracting and retaining the right talent - KPMG
- Aged Care Register of banning orders

Considerations	Yes	Unsure	No	Actions and Comments
Do you have visibility about your workforce: skills, qualifications, certificates, experience, and training needs?				
Do you have a general idea about who is planning to leave/stay in the organisation?				
Do you have a central and secure system that records all staff information and data, including evidence of worker screening checks?				

Do you have a training calendar/similar for staff to access continuous professional development?				
Do you have effective communication processes to inform staff about policy changes, e.g. introduction of a Code of Conduct, SIRS?				
Do you have effective communication channels to inform the Board about policy changes that affect them and all staff?				
Have you updated your internal HR policies to incorporate checks against the new Aged Care Register of banning orders?				
Is your Organisational Culture conducive to change and will staff embrace change?				
Have you established a workforce plan to recruit and retain staff?				

c. Business & Service Model

Key elements of the new program:

- A person-centred approach to care delivery.
- New regulation framework to be risk based which means that there might be new entrants in the market, esp. for low-level services.
- Sole traders will be able to register to deliver subsidised Aged Care services. However, subcontractors of registered providers will not be required to be registered.
- New funding model through a mix of grants and activity-based funding and either an individualised budget or case-mix classification approach.
- Activity-based funding based on service list with price attached so that providers can invoice for those services at the Government subsidy.
- Defined service list that includes: nursing, allied health, personal care, domestic assistance, transport, meals, home maintenance, social support, respite, etc. To be considered by the new Aged Care Taskforce.
- Service prices set by Government (Independent Health and Aged Care Pricing Authority), covering the full cost of service delivery.
- Client contribution set according to capacity to pay, which will be considered by the New Aged Care Taskforce
- Payments made to providers once services have been delivered.
- Separately funded scheme for goods, equipment, assistive technology, and home modifications.
- Additional long-term grants for providers delivering transport, social support group, cottage and centre-based respite, and meal services.
- Additional long-term grants for providers in thin markets such as rural, remote or those delivering to community groups in urban settings.
- Care Partners to monitor older Australians' clinical needs and support them when needed (funding arrangement not determined). Care Partners can sit with the service provider or be independent, and it would be the choice of the older person (there are diverging views which have been acknowledged by the DoHAC).
- Introduction of New Star Rating system (currently applicable to residential care only), with an indication that this would be expanded to home care.

To read more about Business and Service models:

- [A new Regulatory Framework for Aged Care: considerations for existing providers](#)
- [Learning from the transition to NDIS: perspectives for CEOs in Aged Care](#)
- [Strategy & Sustainability in aged care I PwC Australia](#)
- [CHSP providers told to consider exiting home support sector - Community Care Review](#)
- [Aged care market analysis 2022 - KPMG Australia](#)
- [Aged Care Taskforce Terms of Reference](#)

Considerations	Yes	Unsure	No	Actions and Comments
Business Model – which commercial framework do I use? **Which needs do I meet, whose needs do I meet, and where do I meet them?**				
Have you had a reflection about your organisation's position in the market (e.g. advantage and differentiation compared to others)? Do you know how many other providers deliver this service and can you attract a viable size market share?				
Will there be a demand for the service types that you deliver?				
Is your brand well known by your target client group? Is there a positive relationship between your brand and clients' experience with you?				
Does your current service fit within the Service List? If not, will you continue delivering it and how will you fund it?				
Have you considered your current unit pricing in relation to the CHSP National Unit Price Range (indicative pricing [CHSP Manual 2023-24, p.26](#)), and adjusted [CHSP National Unit Price Range](#) *([CHSP provider update 2023-24 Extension](#))?*				
Have you had reflections about Clients Contributions at all? If there is a gap between your service cost and the Government subsidy, do you know how you will fund it?				
Do you understand your financial performance generally (true cost of running services, overheads, profitability/margins, equity)?				

Is your Financial Planning and Budgeting adequate (considering nationally consistent unit prices, fluctuation between seasons, thin markets)?				
Do you establish an annual budget and regularly reforecast to mitigate financial risk?				
Does the Board have an approved minimum level of reserve and is it reported regularly?				
In the context of a risk-based legislation where the registration process and requirements of the provider will be proportionate to the risks posed by the type of care and service, do you know which category your organisation would want to register for?				
If you are operating in a thin market, would you need to apply for a grant? If yes, are you prepared to explain this in an application?				
Service model – how do we deliver these services?				
Do you know your current service model and the positive outcomes that it achieved?				

With the new financial arrangements (payment for service), can you continue using the same delivery model?				
Have you had reflections about alternative business models (Low level care, Shared services, Joint ventures, Partnerships, Collaboration)?				
Have you considered and costed the changing reporting and governance implications (clinical oversight, recording of data about services and outcomes) in relation to our service model?				

d. Consumers

Key elements of the new In-Home program:

- The new consumer focused Aged Care Act is currently undergoing public consultation and is expected to be introduced to Parliament in Q1. The new Aged Care Act is planned to come into effect from July 2024.
- A rights-based approach will be reflected throughout the new Act, including the structure and oversight of the Act. It will outline clear rights and obligations and will empower people to make decisions. This includes a definition about what 'high quality care' is.
- A single assessment system for aged care services that will use a verified assessment tool. It will assess eligibility for all aged care programs, including home care, residential care, transition care, multi-purpose services and respite.
- The single assessment for Aged Care will commence in July 2024. Assessors are expected to begin using the Integrated Assessment Tool available here.

The assessment tool includes the following sections ([Source: DoHAC Overview slides December 2023, slide 4](#)):

What does the tool look like?

13 sections in the IAT		
1 Assessment details	2 Reason for assessment	3 Carer profile
4 Medical and Medications	5 Function	6 Behaviour
7 Physical, Personal health and Frailty	8 Social	9 Cognition
10 Psychological	11 Home and personal safety	12 Financial or Legal
13 Support consideration		

Support Plan		
14 Current access to services	15 Goal setting	16 Assessor recommendations

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- Assessment providers can assess all aged care needs in home or hospital.
- Each older Australian and the assessor develop a monthly support plan for ongoing services, which outlines the person's goals and needs.
- Annual budget to be allocated quarterly and clients will not be allowed to accrue funds at the end of their quarterly budget. However, no reassessment/review will be needed to continue services.
- Service mix can be adjusted at any time, working with the provider(s) within a quarterly budget. However, there will be caps on cleaning and gardening.
- Funding pool for additional client services up to 25% of clients' budgets.
- Senior Australians may choose one provider (or multiple) to deliver the supports on their monthly support plan.
- A Care Partner provides advice, clinical check-ins to identify any changing need.
- New system to be more transparent: consumers will have greater choice and will be able to compare service providers, through the Introduction of new Quality Indicators and Star Ratings in In Home Aged Care (not discussed yet).
- Ability to access short term supports directly, or for more complex supports, with follow up with prescriber. These may include GEATS, Home Modifications, Short term allied health, Specialised support (dementia, vision advisory support).

To read more about Consumers:
- [Customer experience in the ageing sector (KPMG)](#)
- [Royal Commission Final Report: Towards a rights-based system](#)
- [A Human Rights perspective on Aged Care](#)
- [From-Principle-to-Practice-Implementing-the-Human-Rights-Based-Approach-in-Community](#)
- [Exploring Diversity & Wellness – Toolkit for Reflective Conversations](#)

Considerations	Yes	Unsure	No	Actions and Comments
Does your Customer Care/Coordination team have a general understanding about the reforms and how they will change the current Aged Care system?				
Do your teams understand what a new Aged Care Act based on human rights entails in relation to care delivery and working with consumers?				
Do your Customer Care teams understand the principles of Independence, Reablement and Wellness and their application?				
Have you surveyed your consumers for feedback on areas such as: • Their awareness about the aged care reforms. • What services you are known to deliver or are good at. • How do they wish to be kept informed about the reforms and changes that impact them.				
Have you considered developing a customer journey map to understand where your service adds value, and where are the pain points?				

e. Backoffice & Corporate Services

Key elements of the new program:
- New funding model comprised of a mix of grants and activity-based funding and either an individualised budget or case-mix classification approach.
- New payment arrangement for older Australians to manage their funds.
- Payments made to providers once services have been delivered.
- Assurance reviews of home care approved providers to ensure funding is used to deliver services to older Australians. This includes how the provider uses and charges for home care subsidies, structure of financial accounting for services, nature and type of services, procedures, and documentation.
- The Aged Care Taskforce to provide advice on consumer contribution arrangements in Aged Care.

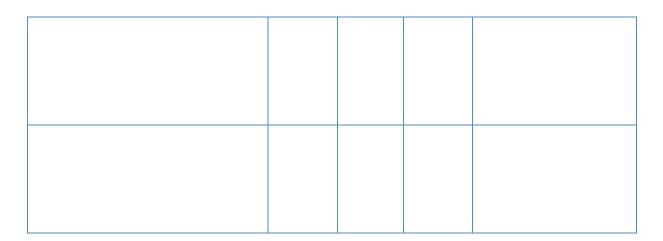**To read more about Backoffice and Corporate Services:**
- Transforming the aged care experience through technology - PwC
- Financial sustainability: CHSP now and in the future Sector Support Brief (February 2023)

Considerations	Yes	Unsure	No	Actions and Comments
Are your business processes streamlined and ready to be aligned to the new payment arrangements?				
Can you utilise service delivery information and data to improve business practices and inform financial planning?				
Are existing systems effectively measuring the real service/activity costs?				
Have you considered whether there are any areas in the business where you can minimise manual intervention?				
Have you assessed where the organisation is from a technological point of view? E.g. use of apps, software, hand-held devices.				

Do your Board and Leadership team have a good understanding of your IT systems and if required, are they planning for the organisation's digital transformation?				
Do you regularly monitor your financial health via different indicators, such as financial KPIs, through client satisfaction (calls, missed visits, complaints, cancellations, move to different providers), and through business development (marketing, client conversion rate, client engagement time)?				
Are you ready to comply with more rigorous reporting (quality standards and compliance to regulations)?				
Do you have cash reserves to support transition to a viable and sustainable business model?				
Can you change internal policies quickly to adapt to new regulatory requirements?				
Have you established a break-even point for your fixed costs?				
Has your Board articulated a risk appetite and approved access to cash reserves to fund the reforms?				
Do you have the management resources and process to attend training, webinars, and discussion activities on the reforms? If yes, are those resources aware of their role to attend and disseminate information to keep the team and Board up to date?				

10. Understanding your responses and developing your Action Plan

Now that you have completed the 5 tables, consider where most of your 'ticks' are located for each of the themes.

Consider each theme one at a time. Are the 'ticks' concentrated in the left of your table (Yes), the middle (Unsure), or in the right (No)?

If most of your ticks are in the left column ('Yes'): this indicates that you may have some elements in place that will facilitate the transition to the new In-Home Aged Care program.

If most of your ticks are in the middle column ('Unsure'): this indicates that you may have not considered the implications of the new In-Home Aged Care program on this area of your organisation.

If most of your ticks are in the right column ('No'): this indicates that you may not have many elements in place yet to support the transition to the new In-Home Aged Care program.

→ *What is next?*

Now that you have an increased understanding about the factors that will facilitate the transition to the new program (the themes where most of your ticks are 'Yes') and the areas where you could focus on (the themes where your responded 'No' or 'Unsure'), we suggest you develop a consolidated Action Plan.

All you have to do is to extract the actions and comments you made while working through the questions. The level of priority and/or timing to complete these actions may depend on the Department of Health and Aged Care's most recent policy updates and the number of areas you consider to be at risk/weaknesses.

You can use the format that suits you best. This can range from a simple list of actions with timelines and responsible party to more complex models such as a Gantt chart. You can use free platforms such as Canva to help design it. Read more about Gantt charts here or watch this short video.

Consider setting realistic timelines, responsible person(s) to implement all these actions, noting that the new In-Home Care program is supposed to start in July 2024.

1. Case studies

a. ABC Clean4You (CHSP funded)

Setting the scene: ABC Clean4You is a CHSP funded provider and delivers one type of service (domestic assistance). They mainly operate in a selected suburb of a big city and employ 8 full-time, 20 part-time staff, and a few casual staff. A team of volunteers also provide shopping assistance, however this is not funded by CHSP. Their clientele base is diverse.

After having applied this workbook to their organisation: ABC Clean4You has identified two areas that the Board and the ELT need to explore as a priority. They have developed an action plan, which includes:

1. **Finances**: **Contract a consultant for a short assignment to understand the true cost of service provision** in our organisation. We have had some issues determining our true unit costing and hence are uncertain whether our service will be viable financially under the new funding system.
    o   Is there a need for us to review existing system to optimise service delivery and cost.
    o   At this stage we request a client contribution for all services – how much do we need to charge clients in the future to remain viable?
2. **Business Model: Schedule meetings with the Board and ELT to respond to key questions:**
    o   Are we likely to keep our customer base in the medium to long-term, noting that DA service providers will be subjected to a low level of regulation, which means potentially many new entrants to this market? What differentiates us from other similar providers?
        o   Shall we consider expanding our service offer? If we do, what other services should we deliver, and do we need to upskill our staff?
        o   Shall we consider partnering with another provider that currently delivers personal care and nursing services? What does this partnership look like?

b. XYZ CareByUs (CHSP and HCP funded)

Setting the scene: XYZ CareByUs is a CHSP and HCP provider that delivers case management, and directly delivers personal care, domestic assistance and social support. Other services are brokered to agents. They operate in a big city but are focused on specific areas where many residents speak English as a second language. They employ 10 full-time staff and 60 part-time staff. They are renowned for the diversity of their workforce, who speak many community languages and are from different faiths.

After having applied this workbook to their organisation: XYZ CareByUs has identified 3 areas that the Board and the ELT need to explore as a priority. They have developed an action plan, which includes:

1. **Governance: Hire a senior leader/director with Clinical expertise** to help the care teams support clients with complex needs. We have some care staff, mainly with Cert IV in Aged Care with a few enrolled nurses but no formal care oversight.
2. **Technology: Conduct desk research about available technology providers.** We use too many different platforms/databases for client data, finances and staff rosters, in addition to entering data into via My Aged Care**.** We need to make sure it is streamlined before the new Payment Platform and the new Serious Incident Response Scheme are introduced.
3. **Workforce: conduct thorough workforce planning exercise**: We think that half of our workers are students who will leave their jobs once they graduate. Who is planning to stay and what are their qualifications? Is everyone up to date with their training and professional development? Do we need to launch a hiring campaign? Should we connect with our local TAFE and Employment Service provider to recruit?

11. Further reading

From the Department of Health and Aged Care:

- Consultation Paper 'A new Aged Care Act' (July 2023)
- FAQ A new model for regulating aged care and new Aged Care Act (May 2023)
- Webinar Reforming in-home aged care update (May 2023)
- Consultation Paper 'A new model for regulating aged care' (April 2023)
- Presentation slides 'A New model for regulating aged care' (May 2023)
- Presentation slides 'Reforming In-Home Aged Care' (May 2023)
- CHSP provider fact sheet – Award changes and financial supports (December 2022)
- Summary 'New Program for In-Home Aged Care discussion paper' (November 2022)
- Preparing for the new in-home aged care program - Provider Fact Sheet No1 (November 2022).
- Consultation Paper 'A new program for In-Home Aged Care' (October 2022)

- Subsidy Estimator and Unspent Funds Examples
- A New Program for In-home Aged Care Discussion Paper – Industry Q&A Session (November 2022)

From the Aged Care Quality and Safety Commission:

- Stronger Standards Better Aged Care Webinar – Slides (June 2023)
- Updated Commission resources (SIRS, Code of Conduct, Governance)
- Clinical governance in aged care - Fact Sheets and Self-assessment tool
- Quality Standards - Self-assessment Tool and Template
- Quality and Safety in Home Services - Guidance and Risk Checklist Tool

Others:

- CHSP Unit Costing Tool
- Financial Modelling Template and Financial Sustainability Framework Ratios
- Positioning organisations for new environments Tool
- Workforce Planning Tool
- Workforce Planning Toolkit
- Comparative Table - current CHSP/HCP, Support at Home and In-Home Aged Care program
- Reform Ready Checklist (July 2023)
- CHSP Readiness Checklist
- Reform Ready Checklist (July 2023)
- Maximizing the Benefits of an External Consultant

Aged Care Learning Library:

This online resource compiles a selection of trainings and frameworks in a variety of areas. In particular, we recommend visiting those listed under 'Governance, Leadership & Change', 'Finance' and 'Workforce'. Visit the Library here.

12. Contact

We welcome feedback and suggestions about this resource. Please contact the Sector Support team at sectorsupport@yourside.org.au.