SERVICE EXIT POLICY AND PROCEDURE

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Purpose and Scope

This policy and procedure sets out Bilingual Care's transparent and equitable service exit procedures, which are designed to uphold the rights of consumers and support them to transition to other supports where required.

It applies to all staff, potential and existing consumers, their family members, carers, supporters and other representatives, and meets relevant legislation, regulations and Standards.

Applicable Strengthened Aged Care Quality Standards

- *Standard 1. The Individual*
- *Standard 2. The Organisation*
- *Standard 3. The Care and Services*

Definitions

Aged Care Systems

There are two main government systems that Bilingual Care will access to verify services and budgets for consumers, including actioning service exits. These are:

1. ***My Aged Care Service and Support Portal***[1], managed by My Aged Care – this secure portal is for registered aged care service providers to manage information about their services, their consumer's services and referrals. The consumer's Notice of Decision and support plan is available in the My Aged Care Service and Support Portal.

2. ***Aged Care Provider Portal***[2] ***(ACPP)***, managed by Services Australia - is a secure, online platform for aged care providers to check consumer budgets, securely manage day-to-day claiming, submit administrative events, and access payment information.

Continuity of Care - maintaining safe, quality care from people who are familiar to and trusted by the consumer, including during and after an emergency event. This includes planning for smooth exits and transitions where the consumer may be changing providers or transitioning to residential care so that the consumer is not left without essential care and services.

Transition Plan - a person-centred plan developed in partnership with the consumer and/or their authorised representative to support the safe, coordinated, and timely transfer or exit from aged care services. The *Transition Plan* outlines the actions required to maintain continuity of care, minimise risk, and uphold the consumer's rights, preferences, and wellbeing during a change in service arrangements. This may include transitions to another provider, entry into residential aged care, hospital admission, or cessation of services.

[1] https://www.health.gov.au/resources/apps-and-tools/my-aged-care-service-and-support-portal

[2] https://www.servicesaustralia.gov.au/using-aged-care-provider-portal?context=20

Policy

Consumers have the right to terminate their service provision and any time, and this decision will not prejudice future access to the service. Bilingual Care's may also initiate service termination under certain conditions, in accordance with the *Aged Care Act (2024)*, *Aged Care Rules*, and the Support at Home Manual guidance.

Consumer transitions from Bilingual Care's services are planned and coordinated and undertaken in collaboration with consumers. Transition arrangements are documented, communicated, and effectively managed.

All exits and transitions will be based on the following principles:

- be person-centred and rights-based (respect their dignity, preferences, and cultural needs)
- ensure continuity and safety of care during transition
- be well-documented and transparent
- include clear communication with the consumer and/or their family, supporter/s and representatives, and other stakeholders if applicable (with consent)
- ensure accurate financial reconciliation, including unspent funds and invoices, and
- meet mandatory reporting and record-keeping requirements.

Procedures

General

Should a consumer, their representative, or Bilingual Care wish to end service provision before the end dates set out in the *Service Agreement*, they must give the other party at least 2 weeks' notice. The notice should be made in writing.

Service exit and referral information must be tracked in Ezihealth to inform continuous improvement.

The Managing Director is responsible for ensuring staff are familiar with the requirements of this policy and have sufficient skills, knowledge, and ability to meet the requirements. As per Bilingual Care's *Onboarding and Induction Policy and Procedure*, all relevant staff must undergo Induction, which includes training in Bilingual Care's exit processes. Staff knowledge and application of this policy and procedure is monitored on a day-to-day basis and through annual Performance Reviews. Additional formal and on-the-job training is provided to staff where required.

Consumer feedback and complaints regarding this policy and procedure must be addressed in accordance with Bilingual Care's *Feedback and Complaints Policy and Procedure*.

In accordance with Bilingual Care's *Privacy and Confidentiality Policy and Procedure*, respect for and protection of consumers' privacy and confidentiality must be reinforced with consumers on an ongoing basis, verbally and in other information provided by staff.

Where required, consumers must be provided with information and support to access a person of their choice, such as an advocate, to assist them to transition from Bilingual Care. See the *Decision Making, Dignity, and Choice Policy and Procedure*.

To ensure consumers, their supporters/representatives, and families understand how to

transition from Bilingual Care's services, Bilingual Care uses its *Consumer Information Pack* and website to provide information about this policy and procedure, in an easy-to-understand format. Staff will also explain the consumer's rights (as per the *Statement of Rights*) in being able to choose their preferred provider and services when deciding to exit or transition.

To ensure consumers understand this information, staff must provide information to them and their representatives in ways that suit their individual communication needs. Written information can be provided in different languages and Easy English or explained verbally by staff. Staff can also help consumers access interpreters or advocates where required.

All consumers exiting the service will be offered an Exit Interview, where the Managing Director will explain the reason for the consumer's service termination (if applicable), obtain feedback about where Bilingual Care can improve its processes, and communicate the steps to re-accessing the service should the consumer wish to.

Consumer Requested Termination

Consumers have the right to terminate their service provision at any time, and this decision will not negatively impact their ability to access Bilingual Care's aged care services in the future. Reasons a consumer may terminate their services could include that they no longer wish to receive Bilingual Care's services, or are moving to a location outside of Bilingual Care's service areas.

When a consumer exits or transitions from services, the Care Partner will ensure the process is managed in a person-centred, transparent and timely manner, including clear communication with the consumer and/or their supporter/representative.

Where appropriate, the consumer or their authorised representative will be provided with written confirmation of the cessation of services. This communication will include:

- confirmation of the exit date
- information about any outstanding services or fees
- details regarding continuity of care (if applicable)
- information on how to access advocacy or support services, and
- advice on how to re-engage with aged care services (if required) and inform the consumer that they have four consecutive quarters (one year) from the last quarter of when they last received a service to enter into a new *Service Agreement* and agree a start date with another Support at Home provider.

The Care Partner is responsible for notifying Services Australia of the consumer's cessation within 28 days of the consumer ceasing service. This is completed in the *Aged Care Provider Portal*[3].

Notifications must be completed as soon as practicable and within required reporting timeframes, and all records must be accurate and up to date.

Exit Transition Planning

Where relevant, the Managing Director must work collaboratively with consumers and their representatives to identify alternative services and referrals that could best meet their needs. See Bilingual Care's *Providing Information, Advice and Referrals Policy and Procedure.*

[3] https://www.servicesaustralia.gov.au/using-aged-care-provider-portal?context=20

With the consumer's or their supporter's consent, Bilingual Care must provide relevant information to new service providers to support the consumer's seamless transition to them. Where required, Bilingual Care staff should introduce the consumer to or meet with staff of alternative providers to facilitate a smooth transition for the consumer. See the Information Sharing Provisions in Bilingual Care's *Providing Information, Advice and Referrals Policy and Procedure*.

A Transition *Plan* must be agreed with the consumer and with their informed consent, any other stakeholders. The plan must contain identified timeframes outlining actions and those responsible for implementing the actions. In addition, risks associated with the transition must be identified, documented, and responded to.

Bilingual Care must also ensure a copy of the consumer's most recent *Consumer Risk Assessment* and *Environmental In-Home Risk Assessment* are provided to new service providers, with the consumer's consent of this information sharing documented in their Transition *Plan.* In addition, a risk assessment must be completed with any new service providers to ensure any risks of the transition process are captured within the Transition *Plan*, along with actions that will be taken to reduce those risks.

A copy of the Transition *Plan* must be provided to the consumer or their representative. A copy must also be kept on the consumer's file and key elements captured in Ezihealth. Where this is not practicable, or the consumer chooses not to have an Transition *Plan*, staff must include a case note on the consumer's file explaining the reasons why the consumer did not receive a copy of their plan.

Steps for Transitioning Out (Exiting) Consumers

When a consumer will be exiting from Bilingual Care's services, the following process outlines what actions must be taken.

1. **Notification and Confirmation** – receive notification of the consumer exiting Bilingual Care's services. This may be due to transitions to another provider, entry into residential aged care, hospital admission, or cessation of services. Document reason for exiting and confirm with consumer and/or their authorised representative planned exit date.

2. **Acknowledge and Communicate** – acknowledge in writing to the consumer next steps, including service cessation/transition timelines, and by when fees and budget reconciliation will occur (no later than 28 days from last service). Note that the last day of Bilingual Care's services must not overlap the first day of services with the next provider (except if transitioning to residential care, which allows for 1 day of overlap to support the consumer to move).

3. **Undertake Risk Assessment and Prepare *Transition Plan*** – where possible and appropriate, meet with the consumer and/or their representative to develop and agree a *Transition Plan*. Assess any potential risks (e.g. gaps in care) and any interim supports, if required. Collaborate with other stakeholders as required. Include information about services to be delivered up to the exit date and any current Assistive Technology or Home Modifications (AT-HM) services currently in progress.

4. **Share Information (with Consent)** – if the consumer will be transitioning to a new provider or moving to residential care, share the *Transition Plan* or key details about care planning and care management with the new (incoming) provider. Note: if

transitioning to another provider and the incoming provider requests information, it is mandatory to provide them with details about care planning, care management and any in-progress AT-HM processes within 28 days after the request is made.

5. **Complete Delivery of Services** – continue to provide care and services as per the *Transition Plan*, and in accordance with their *Service Agreement* and *Care Plan* up until the day before the agreed exit date.

6. **Finalise Care and Service Records** – ensure that reason for exit is clearly documented and all case notes are up to date in the consumer's file in Ezihealth. Close service schedules to ensure services are not provided past the exit date.

7. **Complete Financial Reconciliation -** reconcile all services delivered vs those charged and submit final claim (as per *Financial Management Policy and Procedure*. Claims must be finalised **within 60 days**. This should include any AT-HM scheme claims, where relevant. If there are outstanding claims for AT-HM, these will need to be transferred to the incoming provider (with consumer's consent). Finalise and calculate any Commonwealth and consumer (participant) portions of Home Care Package (HCP) unspent funds.
    - If Bilingual Care holds a participant-portion of HCP unspent funds, then the balance of funds must be paid to the individual within 70 days after the cessation of services.
    - Any Commonwealth portion of HCP unspent funds must be returned to Services Australia where it will be added to the balance of the consumer's home care account. Note: Transitioned HCP consumers who joined the HCP Program after 1 September 2021 will never have any Commonwealth portion of unspent funds held by a provider. Any unspent funds held by a provider will be entirely made up of the participant portion.

8. **Issue a Final Invoice and Final Monthly Statement –** issue the Final Invoice and Final Monthly Statement to the consumer and/or representative, as appropriate.

9. **Notify Incoming Provider of Financial Balances** – if the consumer is transitioning to a new (incoming) provider, the Care Partner must notify them of the consumer's remaining quarterly budget amount and remaining AT-HM budget (if applicable), including the total costs of services that have been delivered prior to the exit date. It should also include services that have been delivered to the consumer (prior to the exit date) but not claimed for. If applicable, detail the Commonwealth portion of HCP unspent funds and any outstanding AT-HM claims that will need to be transferred. Notification to an incoming provider must occur **within 28 days of the consumer's exit date**.

10. **Complete System Updates and My Aged Care / Services Australia Notifications** – update internal systems to deactivate/archive the consumer. Ensure all records are kept in accordance with retention periods as per the *Records and Information Policy and Procedure*. Notify Services Australia **within 28 days of the last service provided**.
    Note: If a consumer moves into permanent residential aged care, their entry date to residential aged care will be the exit date from Support at Home. The Financial Advisor must finalise all claims for services delivered prior to entry into residential aged care **within 60 days from the date a participant enters permanent residential aged care**.

Death of a Consumer

When a consumer passes away, it is essential that all actions taken by staff are guided by compassion, dignity, and respect. Staff should respond sensitively to the consumer's family, carers, supporters and representatives, acknowledging their loss and supporting them in a considerate and culturally appropriate manner. Wherever known, the consumer's preferences, values, and end-of-life wishes should be honoured, including any cultural, spiritual, or personal considerations. Communication should be clear, respectful, and timely, ensuring that processes are handled with care while minimising additional burden on those affected.

Steps when a Consumer has Died

1. **Notification and Confirmation** – receive notification that the consumer has died. If this has occurred during service delivery with Bilingual Care, ensure all steps are followed as per Bilingual Care's *End of Life Care Policy and Procedure* . If the event has occurred outside of service delivery, the Care Partner will obtain confirmation from the consumer's family/carer/supporter/representative, hospital or other reliable authority of the consumer's death, such as with a Death Certificate/Registration of Death. Confirm the date of death and record this in the consumer's file in Ezihealth.

2. **Cease Scheduled Services Immediately** – cancel all scheduled services and inform staff and associated providers (if applicable). Notify any relevant internal staff, such as rostering, finance and the Leadership Team. Ensure no staff attend the consumer's home unless specifically arranged and with the family's permission.

3. **Acknowledge and Communicate** – offer condolences to the consumer's family, carers, supporters and/or representatives in a respectful and culturally appropriate manner. Provide a single point of contact for the family if they require assistance. Clarify next steps regarding service closure, equipment and accounts.

4. **Notify My Aged Care and Services Australia** - the Care Partner will update the *My Aged Care Service and Support Portal* with the departure code and call My Aged Care to update the consumer's record. It is essential that this is completed **as soon as possible from the date of death** to ensure there are no future communications sent to the consumer and their family/supporters.

5. **Complete Financial Reconciliation -** reconcile all services delivered vs those charged (as per *Financial Management Policy and Procedure*. Claims must be finalised **within 60 days from the date after the consumer died**. This should include any AT-HM scheme claims, where relevant. Calculate Commonwealth and consumer (participant) portions of Home Care Package (HCP) unspent funds. If Bilingual Care holds a participant-portion of HCP unspent funds, then the balance of funds must be paid to the individual's estate. This must be completed within 14 days from the date Bilingual Care has been shown the letter of administration for the estate or probate of the will or their estate.

6. **Finalise Care and Service Records** – ensure that reason for ceasing services (death) is clearly documented and all case notes are up to date in the consumer's file in Ezihealth. Arrange for any equipment returns, if applicable (respectfully and sensitively).

Service Termination by Bilingual Care

As part of Bilingual Care's service access and intake processes, consumers must be informed of their rights and responsibilities (see Bilingual Care's *Consumer Rights Policy and Procedure*).

Where Bilingual Care makes the decision to terminate a consumer's care and services, the reason must be provided and explained to them. This must also be included in the consumer's *Transition Plan* if required.

As outlined in its *Service Agreements*, and in accordance with the *Aged Care Act 2024 (Cth)*, Bilingual Care may cease to provide care and services if the consumer:

- can no longer be cared for in the home or community with the resources available
- notifies, in writing, that they wish to relocate to an area outside of Bilingual Care's current service area
- notifies, in writing, that they no longer wish to receive Bilingual Care's services
- has condition changes to the extent that they no longer need home care services
- has needs, as assessed by an approved My Aged Care assessor, can be more appropriately met by other types of services or care.
- has not paid (for a reason within the consumer's control) any fee specified in the *Service Agreement* and has not negotiated an alternative arrangement with Bilingual Care for payment and/or
- has intentionally caused serious injury to a Bilingual Care staff member or intentionally infringed on the right of a Bilingual Care staff member to work in a safe environment.

Bilingual Care must not cease services due to unpaid fees if the consumer has applied for Financial Hardship and the application is still being assesses.

Service exit must only be actioned after discussion and consultation with the consumer, their representatives and other important stakeholders, and strategies have been implemented to attempt to resolve challenges or barriers. Bilingual Care will ensure every effort is made to transfer the consumer to a more appropriate service or program where relevant. Bilingual Care will ensure current services remain in place where possible, until an appropriate service or program is sourced.

If Bilingual Care decides to terminate the consumer's services, the Managing Director must provide at least 28 days' notice. The notice will be in writing and include the date services will end, reasons for the decision and the consumer's rights about the decision. The consumer must be offered support to access complaint resolution mechanisms and an advocate if required.

The Managing Director will follow the ***Steps for Transitioning Out (Exiting) Consumers*** to exit the consumer.

Appeal

Consumers who have their services terminated by Bilingual Care have the right to appeal. Appeals should be directed in writing to the Managing Director and a final decision will be made by the Leadership Team. People who successfully appeal will be supported to continue accessing Bilingual Care's services. People who are not successful in their appeal will be provided advice in writing to this effect.

Temporarily Stopping (Suspending) Services

The consumer may request a temporary stop (suspension) of services for any reason and

whenever required. This may occur if they are hospitalised, are in a transition care programme, are travelling or on holidays, or for other personal circumstances. The consumer must provide notice to the Care Partner as soon as possible, including details of when and for how long they wish to temporarily stop services.

The Care Partner must confirm with the consumer in writing any suspension, including the duration and arrangements for resuming services. This may include updating the consumer's *Care Plan* or *Individualised Budget*, as per Bilingual Care's *Care Review Policy and Procedure*.

During a suspension, the consumer must not be charged for services while services are temporarily stopped. Any unspent funds will carry-over, as per the Support at Home program guidelines. Any suspension of services for more than a total of four consecutive quarters (one year) since the end of the quarter from when the last service was delivered may impact the consumer's ongoing eligibility for funding. See the *Consumer Budget Management Policy and Procedure* for guidance.

Note that cancelling or rescheduling services is different to suspension. If a consumer needs to cancel or reschedule services, please refer to *the Consumer Budget Management Policy and Procedure*.

Returning Consumers

Consumers exiting / transitioning from Bilingual Care services will be advised by the Managing Director of their right to return to the service should they wish, or if it is appropriate.

The Managing Director is responsible for ensuring consumers and their representatives understand the process involved in returning to Bilingual Care, as per the *Service Access and Intake Policy and Procedure*.

If a consumer requests to return to Bilingual Care and Bilingual Care has initiated the consumer's termination from, should they request to return, the Managing Director and must determine whether this is suitable or appropriate.

Files and Documentation

Upon a consumer's exit from Bilingual Care, Bilingual Care will retain the original service records created in the course of delivering care, in accordance with record-keeping requirements. Consumers or their authorised representatives have the right to access and request copies of their information, including *Service Agreements*, *Care Plans*, assessments, and service records.

Any original documentation provided by the consumer or other service providers will be returned to the consumer or their representative where requested. Copies of these documents may be retained by Bilingual Care to support continuity of care and meet legal obligations.

All information in relation to the consumer will be retained, secured, and stored in accordance with Bilingual Care's *Records and Information Management Policy and Procedure*.

Feedback and Complaints

Consumers, their family, carers, supporters and representatives are encouraged to provide feedback or raise concerns at any stage, including during or after exiting Bilingual Care's

services.

All feedback and complaints will be acknowledged promptly and managed in accordance with Bilingual Care's *Feedback and Complaints Policy and Procedure*. Consumers have the right to raise concerns without fear of reprisal, and may also choose to escalate complaints to external bodies, including the Aged Care Quality and Safety Commission, if they are not satisfied with the outcome. Consumers may also enact Bilingual Care's *Whistleblower Policy and Procedure* at any time.

Supporting Documents

Documents relevant to this policy and procedure include:

- *Care Review Policy and Procedure*
- *Consumer Rights Policy and Procedure*
- *Decision Making, Dignity, and Choice Policy and Procedure*
- *End of Life Policy and Procedure*
- *Feedback and Complaints Policy and Procedure*
- *Initial Assessment and Care Planning Policy and Procedure*
- *Onboarding and Induction Policy and Procedure*
- *Privacy and Confidentiality Policy and Procedure*
- *Providing Information, Advice and Referrals Policy and Procedure*
- *Records and Information Management Policy and Procedure*
- *Service Access and Intake Policy and Procedure*
- *Service Agreements*
- *Transition Plans*
- *Consumer Risk Assessments*
- *Environmental In-Home Risk Assessments*
- *Consumer Information Pack*

Monitoring and Review

This Policy and Procedure will be reviewed at least annually by the Leadership Team. Reviews will incorporate staff, consumer, and other stakeholder feedback.

Bilingual Care's feedback collection mechanisms, such as consumer satisfaction surveys and service delivery planning activities, will assess:

- consumer awareness of Bilingual Care's exit procedures
- consumer satisfaction with Bilingual Care's exit procedures and management of appeals regarding exit and
- feedback provided by and to consumers and potential consumers around access and refusal and whether the information provided to consumers is appropriate and effective.

Bilingual Care's *Continuous Improvement Plan* will be used to record improvements identified and monitor the progress of their implementation. Where relevant, this information will be considered as part of Bilingual Care's service planning and delivery processes.

DOCUMENT CONTROL

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