

Purpose of this form

This form is to make sure the person providing care can be paid (or continue to be paid) Carer Payment. Carer Payment is an income support payment for people who are unable to support themselves through substantial paid employment due to the demands of their caring role.

A person providing care may be paid Carer Payment if the combined income and assets of the person being cared for, their partner and in some circumstances their children, are below certain limits. These limits are updated each year.

This is a request for information under section 196 of the *Social Security (Administration) Act 1999*.

Who should complete this form?

This form should be completed by the person being cared for (or their nominee).

Filling in this form

- Please use black or blue pen.
- Print in BLOCK LETTERS
- Mark boxes like this ☐ with a tick ✓ or ✗.
- Where you see a box like this ☐ ➤ **Go to 5** skip to the question number shown. You do not need to answer the questions in between.

Returning your form

Check that all required questions are answered and that the form is signed and dated.

Return this form and any supporting documents to us **within 14 days** or Carer Payment may be rejected or stopped. If you cannot do this **within 14 days**, you must contact us at the earliest possible date to make an arrangement.

You can return this form and any supporting documents:

- online – the customer claiming Carer Payment can submit these documents online through their Centrelink Online Account through myGov. For more information about how to access an Online Account or how to lodge documents online, go to **servicesaustralia.gov.au/submitdocumentsonline**
- by post – return your documents by sending them to:
**Services Australia
Carer Services
PO Box 7805
CANBERRA BC ACT 2610**
- in person – if you are unable to submit this form and any supporting documents online or by post, you can provide them in person to one of our service centres.

For more information

Go to **servicesaustralia.gov.au/carers** or call us on **132 717** or visit one of our service centres.

If you need a **translation** of any documents for our business, we can arrange this for you free of charge.

To speak to us in your language, call **131 202**.

Note: Call charges may apply.

If you have a hearing or speech impairment, you can contact the **TTY service Freecall™ 1800 810 586**. A TTY phone is required to use this service.

- 1 Do you need an interpreter when dealing with us?
This includes an interpreter for people who have a hearing or speech impairment.

No ☐ ► **Go to 4**

Yes ☐ ► *Go to next question*

- 2 What is your preferred spoken language?

- 3 What is your preferred written language?

Carer's details—person providing care

- 4 Name of the person providing care for you (e.g. the person who is claiming or receiving Carer Payment for care they provide for you)?

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Mx ☐ Other

Family name

First given name

Second given name

- 5 Carer's Centrelink Reference Number (if known)

 - - -

Your personal details—person being cared for

- 6 Your name

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Mx ☐ Other

Family name

First given name

Second given name

- 7 Have you ever used or been known by any other name (e.g. name at birth, maiden name, previous married name, Aboriginal or tribal name, alias, adoptive name, foster name)?

No ☐ ► *Go to next question*

Yes ☐ ► Give details below

1 Other name

Type of name (e.g. name at birth)

2 Other name

Type of name (e.g. maiden name)

If you have more than 2 other names, attach a separate sheet with details.

- 8 Your Centrelink Reference Number (if known)

 - - -

- 9 Your gender

Male ☐

Female ☐

Non-binary ☐

- 10 Your date of birth

 / / 

CLK0SA304a 2212

11 Your country of birth

12 Your permanent address

Postcode

13 Your postal address (if different to above)

Postcode

14 Your contact phone number

Is this a silent number? No ☐ Yes ☐

15 Do you have a partner?

No ☐ **Go to 24**

Yes ☐ **Go to next question**

16 Your partner's name

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Mx ☐ Other

Family name

First given name

Second given name

17 Has your partner ever used or been known by any other name (e.g. name at birth, maiden name, previous married name, Aboriginal or tribal name, alias, adoptive name, foster name)?

No ☐ **Go to next question**

Yes ☐ **Give details below**

1 Other name

Type of name (e.g. name at birth)

2 Other name

Type of name (e.g. maiden name)

If your partner has more than 2 other names, attach a separate sheet with details.

18 Your partner's gender

Male ☐

Female ☐

Non-binary ☐

19 Your partner's date of birth

20 Your partner's country of birth

21 Your partner's contact phone number

Is this a silent number? No ☐ Yes ☐

22 Do you give permission for your partner to speak with us on your behalf?

You can change this authority at any time.

No ☐

Yes ☐

23 Is your partner your carer?

No ☐ **Go to next question**

Yes ☐ **Go to 25**

Permission to enquire

- 24** Do you give permission for your carer to speak with us on your behalf?

You can change this authority at any time.

No ☐

Yes ☐

About your family

- 25** Do you (and/or your partner) have any dependent children under 16 years of age, or full-time students studying to Year 12 or equivalent under 20 years of age, in your care?

No ☐ ► ***Go to 37 on page 7***

Yes ☐ ►

If you have more than 2 dependent children, before completing the details for Child/Student 1 and 2, copy page 5 for each additional child/student you need to provide details for.

► ***Go to next question***

Child/Student 1

26 Child's/Student's name

Family name

First given name

Second given name

27 Has this child/student ever been known by any other name?

No ☐ **Go to next question**

Yes ☐ **List the other names**

28 Child's/Student's gender

Male ☐

Female ☐

Non-binary ☐

29 Child's/Student's date of birth

 / /

30 Which of the following best describes your relationship to this child/student?

Parent ☐

Step parent/guardian ☐

Foster carer ☐

Other ☐ **Give details below**

31 Does this child/student get a payment from any Commonwealth, state or territory government?

No ☐ **Go to next question**

Yes ☐ **Give details below**

32 Is this child/student in full-time education?

No ☐

Yes ☐

33 Does this child/student receive any income from work or other sources such as investments, or have an interest in any family trust, life interest or deceased estate?

No ☐ **Go to 36**

Yes ☐ **Go to next question**

34 What was this child's/student's taxable income for the base tax year?

If you are completing this form because of a **new claim** for Carer Payment, the base tax year is the financial year that ended on 30 June of the calendar year immediately before this current calendar year.

If you are completing this form because of a **review** of Carer Payment currently paid, the base tax year is the last financial year.

\$

Financial year

1 July 20 to 30 June 20



Attach the child's/student's Notice of Assessment for the base tax year (if available).

35 What is your estimate of this child's/student's taxable income for the current financial year we are in now?

\$

Financial year

1 July 20 to 30 June 20

36 Do you (and/or your partner) have another dependent child under 16 years of age, or a full-time student studying to Year 12 or equivalent under 20 years of age, in your care?

Do NOT include any child/student you are claiming/receiving Carer Allowance for.

No ☐ **Go to 37 on page 7**

Yes ☐ If you have more than 2 dependent children, and if you have not already copied page 4, copy and attach page 5 for each additional child/student before completing the details for child/student 2.

Go to next question

26 Child's/Student's name

Family name

First given name

Second given name

27 Has this child/student ever been known by any other name?

No ☐ **Go to next question**

Yes ☐ List the other names

28 Child's/Student's gender

Male ☐

Female ☐

Non-binary ☐

29 Child's/Student's date of birth

 / /

30 Which of the following best describes your relationship to this child/student?

Parent ☐

Step parent/guardian ☐

Foster carer ☐

Other ☐ Give details below

31 Does this child/student get a payment from any Commonwealth, state or territory government?

No ☐ **Go to next question**

Yes ☐ Give details below

32 Is this child/student in full-time education?

No ☐

Yes ☐

33 Does this child/student receive any income from work or other sources such as investments, or have an interest in any family trust, life interest or deceased estate?

No ☐ **Go to 36**

Yes ☐ **Go to next question**

34 What was this child's/student's taxable income for the base tax year?


If you are completing this form because of a **new claim** for Carer Payment, the base tax year is the financial year that ended on 30 June of the calendar year immediately before this current calendar year.

If you are completing this form because of a **review** of Carer Payment currently paid, the base tax year is the last financial year.

\$

Financial year

1 July 20 to 30 June 20

 Attach the child's/student's Notice of Assessment for the base tax year (if available).

35 What is your estimate of this child's/student's taxable income for the current financial year we are in now?

\$


Financial year

1 July 20 to 30 June 20

36 Do you (and/or your partner) have another dependent child under 16 years of age, or a full-time student studying to Year 12 or equivalent under 20 years of age, in your care?

Do NOT include any child/student you are claiming/receiving Carer Allowance for.

No ☐ **Go to next question**

Yes ☐  Attach details of each additional child/student.

Go to next question

Family assets

37 Please read this before answering the following questions about family assets.

The carer's entitlement to Carer Payment depends on the net market value of your family assets and in some cases your family's liquid assets.

Net market value is the amount you would get if you sold an asset, less any money you owe on the asset.

Family assets are assets in and/or outside Australia that belong to you, your partner, all dependent children under 16 years of age, or full-time students studying to Year 12 or equivalent under 20 years of age, in your care.

Include:

- bank, building society and credit union accounts
- managed investments, shares, bonds and debentures
- money on loan to family members, family trusts, an organisation or any other person
- motor vehicles, boats and caravans
- real estate
- household contents and personal effects
- collections (e.g. stamps, coins, paintings, jewellery).

Do NOT include:

- your family home
- an account used exclusively for funding from the National Disability Insurance Scheme.

What is the current total net market value of your family assets?

\$

38 What portion of your current total family assets are liquid assets?

Liquid assets include cash, shares, loans, term deposits and amounts deposited or lent to banks or other financial institutions.

Do NOT include liquid assets from the National Disability Insurance Scheme.

\$

39 In the last 5 years have you (and/or your partner and/or any of your dependent children under 16 years of age, or full-time students studying to Year 12 or equivalent under 20 years of age, in your care) given away, sold for less than their market value, or surrendered a right to any cash, assets, property or income?

Include forgiven loans and shares in private companies.

No ☐ Go to next question

Yes ☐ Give details below

What you gave away or sold for less than its market value (e.g. money, car, second home, land, farm)

Date given or sold

What it was worth

\$

Amount you sold it for

\$

Your share

%

Partner's share

%

Was this gift to a Special Disability Trust (SDT)?

No ☐

Yes ☐

If you (and/or your partner and/or any of your dependent children under 16 years of age, or full-time students studying to Year 12 or equivalent under 20 years of age, in your care) have given away or sold for less than its market value more than 1 item, provide a separate sheet with details.

Taxable income

40 Please read this before answering the following questions about taxable income.

We need to know your (and/or your partner's) taxable income for the base tax year.

How to find out your taxable income for the base tax year:

- If you are completing this form because of a **new claim** for Carer Payment, the base tax year is the financial year that ended on 30 June of the calendar year immediately before this current calendar year.
If you are completing this form because of a **review** of Carer Payment currently paid, the base tax year is the last financial year.
- Your taxable income is shown on your Notice of Assessment.
 - The Notice of Assessment is sent to you by the Australian Taxation Office to advise you of the tax you owe or your refund entitlement.
- If you lodged your tax return, but have not yet received your Notice of Assessment, you can tell us the amount shown on your tax return.

41 Can you give us your (and/or your partner's) taxable income details from a Notice of Assessment or a tax return for the base tax year?

Note:

- Your carer may qualify, or continue to qualify, for Carer Payment if your (and/or your partner's) taxable income is less than the current limit.
- If your taxable income has fallen since the base tax year, we may be able to accept an estimate of your taxable income.

YOU

No ☐ Go to next question

Yes ☐ Give details below

Taxable income

\$

Financial year

1 July 20

to 30 June 20

YOUR PARTNER

No ☐ Go to next question

Yes ☐ Give details below

Taxable income

\$

Financial year

1 July 20

to 30 June 20



Attach your (and/or your partner's) Notice of Assessment or tax return for the base tax year.

▶ Go to 43

42 What is your (and/or your partner's) estimate of taxable income for the base tax year?

Financial year

1 July

20

to 30 June

20

A Taxable income from employer(s)

Include earnings, overtime payment, termination payment, long service.

YOU

\$

YOUR PARTNER

\$

B Taxable income from government pensions or benefits

Include Centrelink payments, Department of Veterans' Affairs.

Do NOT include Family Tax Benefit.

YOU

\$

YOUR PARTNER

\$

C Taxable income from investments

Include income from banks, building societies and credit unions, and dividends from shares or debentures and other financial institutions.

YOU

\$

YOUR PARTNER

\$

D Other taxable income

Include taxable allowances or annuities, compensation for loss of income.

Do NOT include Family Tax Benefit or Carer Allowance.

YOU

\$

YOUR PARTNER

\$

E Total estimated taxable income (A + B + C + D = E)

YOU

\$

YOUR PARTNER

\$

F Estimated deductions allowed by the Australian Taxation Office

YOU

\$

YOUR PARTNER

\$

G Total estimated taxable income after allowable deductions (E minus F = G)

YOU

\$

YOUR PARTNER

\$

H Total estimated COMBINED taxable income

YOU and YOUR PARTNER

\$

43 What is your (and/or your partner's) estimate of taxable income for the current financial year?

Financial year

1 July

20

to 30 June

20

A Taxable income from employer(s)

Include earnings, overtime payment, termination payment, long service.

YOU

\$

YOUR PARTNER

\$

B Taxable income from government pensions or benefits

Include Centrelink payments, Department of Veterans' Affairs.

Do NOT include Family Tax Benefit.

YOU

\$

YOUR PARTNER

\$

C Taxable income from investments

Include income from banks, building societies and credit unions, and dividends from shares or debentures and other financial institutions.

YOU

\$

YOUR PARTNER

\$

D Other taxable income

Include taxable allowances or annuities, compensation for loss of income.

Do NOT include Family Tax Benefit or Carer Allowance.

YOU

\$

YOUR PARTNER

\$

E Total estimated taxable income (A + B + C + D = E)

YOU

\$

YOUR PARTNER

\$

F Estimated deductions allowed by the Australian Taxation Office

YOU

\$

YOUR PARTNER

\$

G Total estimated taxable income after allowable deductions (E minus F = G)

YOU

\$

YOUR PARTNER

\$

H Total estimated COMBINED taxable income

YOU and YOUR PARTNER

\$

Checklist

44 Which of the following documents and other attachments are you (and/or your partner) providing with this form?

If you are not sure, check the question to see if you should attach the documents.

Where you are asked to supply documents, please attach certified copies.

Each child's/student's Notice of Assessment for the base tax year (if available) (See **question 34**) ☐

Details of additional children/students (If you answered Yes at **question 36**) ☐

Your (and/or your partner's) Notice of Assessment or tax return for the base tax year (If you answered Yes at **question 41**) ☐

45 **IMPORTANT INFORMATION**

Privacy and your personal information

Your personal information is protected by law (including the *Privacy Act 1988*) and is collected by Centrelink for administering payments and services. This information is required to assist with your application or claim.

Your information may be used by us, or given to other parties: where you have agreed to that; or where it is required or authorised by law (including for the purpose of research or conducting investigations).

You can get more information about the way in which we will manage your personal information, including our privacy policy at servicesaustralia.gov.au/privacy

Statement

46 **Statement**

I declare that:

- the information I have provided in this form is complete and correct.

I understand that:

- giving false or misleading information is a serious offence.
- Centrelink can make relevant enquiries to make sure correct entitlements are received.
- information will not be given to my carer unless I agree.

Your signature—person being cared for



Date

/ /

Your partner's signature (if applicable)



Date

/ /