

# Claim for Age Pension and Pension Bonus (SA002)

## When to use this form



Use this form to claim the following:

### Age Pension

The Age Pension provides income support and access to a range of concessions for eligible older Australians. The Age Pension is paid at different rates depending on a person's circumstances and includes incentives for people to maximise their overall income.

### Pension Bonus

The Pension Bonus is a tax free lump sum payment for registered members of the Pension Bonus Scheme who have deferred claiming Age Pension and stayed in paid work. **The scheme is closed to new registrations.** If you are registered in the scheme, you must claim the bonus at the same time you claim Age Pension. Conditions apply.

## Online services



**Completing this form online is faster and easier.**

**Access your Centrelink online** account through myGov. Select **Payments and claims**, then **Claims** and **Make a claim**. Under **Older Australians**, select **Get started**.

If you do not have a myGov account, you can create one at [my.gov.au](http://my.gov.au) and link it to your Centrelink online account.

## What else you may need to provide

You may need to provide identity documents. For a list of acceptable documents, refer to 'Confirming your identity' in the **Information you need to know about your claim for Age Pension and Pension Bonus (Ci006) (Information Booklet)** or go to [servicesaustralia.gov.au/identity](http://servicesaustralia.gov.au/identity)

## For more information

Refer to the **Information Booklet** at [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms) or go to [servicesaustralia.gov.au/agepension](http://servicesaustralia.gov.au/agepension)

For more information about how to lodge documents online, go to [servicesaustralia.gov.au/centrelinkuploaddocs](http://servicesaustralia.gov.au/centrelinkuploaddocs)



### Help in your language

We can translate documents you need for your claim for free. To speak to us in your language, call **131 202**. Call charges may apply.



### Telephone Typewriter

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

## Partner Permitted to Enquire

Allowing your partner to enquire on your behalf, may save you time when dealing with us. It will let you and your partner use more self-service functions online and over the phone.

If you give your partner **permission to enquire**, it will allow your partner to ask questions about your Centrelink payments and services. They could ask us:

- your current rate of payment
- the reason your payment has stopped
- the reason your payment has gone up or down, for example, income and assets, debt and back payment information.

They **can** tell us how much employment income you were paid, changes in your circumstances and view your details online.

*Continued*

They **cannot**:

- act on your behalf with Centrelink
- apply for payments for you
- fill in and sign forms and statements on your behalf
- come to appointments for you.

You have a right to have your personal information kept private. For more information, go to [servicessaustralia.gov.au/privacy](https://servicessaustralia.gov.au/privacy)

**Changing your partner's permission to enquire is your choice and you can change this permission at any time.**

If you think your partner is misusing the arrangement, call **132 850** or visit one of our service centres.

## Forms in your claim pack

In your claim pack, you should have the following:

- **Claim for Age Pension and Pension Bonus (SA002)** form
- **Income and Assets (SA369)** form.

## Filling in this form

- Use black or blue pen.
- Print in BLOCK LETTERS.
- Where you see a box like this  ► **Go to 1** skip to the question number shown.

## How to claim

If you have a partner and you are both claiming Age Pension, you may choose to complete one claim pack together or complete a separate claim pack for each person.

If your partner is not claiming Age Pension they still need to provide their details. They can do so on this form or a separate **Partner details (Mod P)** form. If you do not have this form, go to [servicessaustralia.gov.au/forms](https://servicessaustralia.gov.au/forms)

Complete the claim form(s) and any additional forms required. You may choose to use an accountant or financial adviser to complete your **Income and Assets (SA369)** form but you must sign it. If you need other people to assist with completing your forms, make sure you give them the forms as soon as possible.

## Important note

To make sure you are paid from the earliest possible date, you should lodge your claim as soon as possible. You may lodge your form without the other forms and documentation, however, they will need to be provided before the claim can be processed. Age Pension claims can be lodged up to 13 weeks before you reach Age Pension age. Make sure you add **all** required documents as outlined in the Checklist.

## Age Pension for people who are permanently blind

Make an appointment with the ophthalmologist/optometrist who usually treats you (and/or your partner). You should have been given a **Request for Ophthalmologist/Optomtrist Report (SA013)** form. If you do not have this form, go to [servicessaustralia.gov.au/forms](https://servicessaustralia.gov.au/forms)

When you (and/or your partner) make the appointment, tell the receptionist that you (and/or your partner) need the optician to complete a form for us, as they may need to allow more time. The optician may complete the report and give it back to you (or your partner) or they may send it directly to us. Make sure the report has your (or your partner's) name and address on it.


## Department of Veterans' Affairs Disability Compensation Payment option

If you (and/or your partner) currently get a Disability Compensation Payment from the Department of Veterans' Affairs (DVA), you can both choose to have your Age Pension paid by DVA instead of us. You will need to complete the claim forms but **lodge them with DVA** (contact your local DVA office for lodgement details).


## Age Pension

- 1 Do you have a partner?  
No  **Go to 4**  
Yes  We require your partner's details to assess your claim. *Go to next question*
- 2 Is your partner also claiming Age Pension?  
No  Your partner can provide their details on this form or a separate **Partner details (Mod P)** form. *Go to next question*  
Yes  Your partner can claim on this form or on a separate forms. *Go to next question*
- 3 Is your partner using this form or a separate form for a claim or to provide their details?  
This form   
Separate form

### You

- 4 Your Customer Reference Number (if known)
- 5 Your name  
Mr  Mrs  Miss  Ms  Mx  Other   
Family name   
First given name   
Second given name
- 6 Your date of birth (DD MM YYYY)
-  If you are claiming Age Pension, provide proof of your date of birth.

### Your partner

- 4 Your Customer Reference Number (if known)
- 5 Your name  
Mr  Mrs  Miss  Ms  Mx  Other   
Family name   
First given name   
Second given name
- 6 Your date of birth (DD MM YYYY)
-  If you are claiming Age Pension, provide proof of your date of birth.



CLK0SA002 2305

**You**

7 Do you need an interpreter?

Available in international, Indigenous, Auslan and other sign languages.

No  Go to 10

Yes  Go to next question

8 What is your preferred spoken language?

9 What is your preferred written language?

10 Have you been known by any other name(s)?

**Include:**

- name at birth
- name before marriage
- previous married name
- Aboriginal or skin name
- alias
- adoptive name
- foster name.

No  Go to next question

Yes  Give details below

**1** Other name

Type of name (for example, name at birth)

**2** Other name

Type of name (for example, name before marriage)

If you need more space, provide a separate sheet with details.

11 Your gender

Male

Female

Non-binary

**Your partner**

7 Do you need an interpreter?

Available in international, Indigenous, Auslan and other sign languages.

No  Go to 10

Yes  Go to next question

8 What is your preferred spoken language?

9 What is your preferred written language?

10 Have you been known by any other name(s)?

**Include:**

- name at birth
- name before marriage
- previous married name
- Aboriginal or skin name
- alias
- adoptive name
- foster name.

No  Go to next question

Yes  Give details below

**1** Other name

Type of name (for example, name at birth)

**2** Other name

Type of name (for example, name before marriage)

If you need more space, provide a separate sheet with details.

11 Your gender

Male

Female

Non-binary



## You

- 17 If you answered 'Yes' at question 1, do you give permission for your partner to speak with us on your behalf?

For more information, read page 1.

No

Yes

- 18 Do you want to authorise a person or organisation to make enquires, make updates, act and/or get payments on your behalf?

No  ► Go to next question

Yes  ► Give details below



You need to fill in and return an **Authorising a person or organisation to enquire or act on your behalf (SS313)** form. You can also do this online. You and the person or organisation will need a Centrelink online account.

If you want more information or to download the form, go to [servicessaustralia.gov.au/authorisedrepresentative](http://servicessaustralia.gov.au/authorisedrepresentative)

- 19 What country are you currently living in?

This is the country where you normally live on a long term basis.

Australia  ► Go to next question

Other  ► Country where you live

- 20 Have you **ever** travelled outside Australia, including short trips and holidays?

This question will help us to verify your Australian residence.

No  ► Go to next question

Not applicable – never  ► Go to next question  
travelled to Australia

Yes  ► Give details below

Year you last entered Australia

Passport number

Country of issue

- 21 Are you an Australian citizen **who was born in Australia**?

No



You will need to provide proof of your Australian residence status (for example, **citizenship papers, passport or other documentation**).

► Go to next question

Yes  ► Go to 30

## Your partner

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

For more information, read page 1.

No

Yes

- 18 Do you want to authorise a person or organisation to make enquires, make updates, act and/or get payments on your behalf?

No  ► Go to next question

Yes  ► Give details below



You need to fill in and return an **Authorising a person or organisation to enquire or act on your behalf (SS313)** form. You can also do this online. You and the person or organisation will need a Centrelink online account.

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Not applicable – never  ► Go to next question  
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Yes  ► Give details below

Year you last entered Australia

Passport number

Country of issue

- 21 Are you an Australian citizen **who was born in Australia**?

No



You will need to provide proof of your Australian residence status (for example, **citizenship papers, passport or other documentation**).

► Go to next question

Yes  ► Go to 30

**You**

22 What is your country of birth?

23 What is your country of citizenship?

Australia  Date citizenship granted (DD MM YYYY)

Go to next question

Other  Give details below

Country of citizenship

Date citizenship granted (DD MM YYYY)

25 What type of visa did you arrive on?

Permanent  Go to next question

Temporary  Go to next question

New Zealand passport  Go to 27  
(Special Category visa)

Not sure  Go to 27

26 Your visa details on arrival

Visa subclass Date visa granted (DD MM YYYY)

27 Has your visa changed since you arrived in Australia?

No  Go to next question

Yes  Most recent visa details

Visa subclass Date visa granted (DD MM YYYY)

28 When did you most recently start living in Australia?

   (DD MM YYYY)

**Your partner**

22 What is your country of birth?

23 What is your country of citizenship?

Australia  Date citizenship granted (DD MM YYYY)

Go to next question

Other  Give details below

Country of citizenship

Date citizenship granted (DD MM YYYY)

24 Read this if you are not claiming on this form.

If you have never lived in Australia, do not complete question 25 to question 30.

25 What type of visa did you arrive on?

Permanent  Go to next question

Temporary  Go to next question

New Zealand passport  Go to 27  
(Special Category visa)

Not sure  Go to 27

26 Your visa details on arrival

Visa subclass Date visa granted (DD MM YYYY)

27 Has your visa changed since you arrived in Australia?

No  Go to next question

Yes  Most recent visa details

Visa subclass Date visa granted (DD MM YYYY)

28 When did you most recently start living in Australia?

   (DD MM YYYY)

**You**

**29** Did you start living in Australia before 1965?

No  Go to next question

Yes  Give details below

Name of the ship or airline on which you arrived

Name of the place where you first arrived/disembarked

What was your name when you first arrived in Australia?

**30** Read this before answering the following question.

We need to know if you have lived in any countries other than Australia. 'Lived' means where you or your family made your home or spent a long period of time – it does not include places you visited for a holiday.

Have you **ever** lived outside Australia for any period?

No  Go to next question

Yes  List **all** countries you have lived in since birth and the date you started living in each country.

**Include** when you started living in **Australia**.

**Do not include** short trips or holidays.

**1** Country

Date from (DD MM YYYY)

**2** Country

Date from (DD MM YYYY)

**3** Country

Date from (DD MM YYYY)

If you need more space, provide a separate sheet with details.

**Your partner**

**29** Did you start living in Australia before 1965?

No  Go to next question

Yes  Give details below

Name of the ship or airline on which you arrived

Name of the place where you first arrived/disembarked

What was your name when you first arrived in Australia?

**30** Read this before answering the following question.

We need to know if you have lived in any countries other than Australia. 'Lived' means where you or your family made your home or spent a long period of time – it does not include places you visited for a holiday.

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No  Go to next question

Yes  List **all** countries you have lived in since birth and the date you started living in each country.

**Include** when you started living in **Australia**.

**Do not include** short trips or holidays.

**1** Country

Date from (DD MM YYYY)

**2** Country

Date from (DD MM YYYY)

**3** Country

Date from (DD MM YYYY)

If you need more space, provide a separate sheet with details.



**You**

**31** Where do you want your payment made?

The account must be in your name. A joint account is acceptable.  
Payments cannot be made into an account used exclusively for funding from the National Disability Insurance Scheme.

Name of bank, building society or credit union

Branch number (BSB)

Account number (this may not be your card number)

Account held in the name(s) of

**32** **Read** this before answering the following question.

The pension supplement helps you to meet the costs of your daily household and living expenses. It is automatically paid each fortnight with your regular pension.  
You have the option to receive part of the pension supplement on a quarterly basis. This part is known as the minimum pension supplement amount. You may find this option useful for budgeting purposes. If you choose this option, the minimum pension supplement amount accrues daily during the quarter and is paid as soon as possible after 20 March, 20 June, 20 September and 20 December with your fortnightly pension payment.  
The option to get the minimum pension supplement as a fortnightly payment or quarterly payment can be changed at any time.

How often do you wish to receive the minimum pension supplement amount?

- Fortnightly
- Quarterly

**Your partner**

**31** Where do you want your payment made?

**Only give details if you are also claiming Age Pension on this form.**  
The account must be in your name. A joint account is acceptable.  
Payments cannot be made into an account used exclusively for funding from the National Disability Insurance Scheme.

Name of bank, building society or credit union

Branch number (BSB)

Account number (this may not be your card number)

Account held in the name(s) of

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The pension supplement helps you to meet the costs of your daily household and living expenses. It is automatically paid each fortnight with your regular pension.  
You have the option to receive part of the pension supplement on a quarterly basis. This part is known as the minimum pension supplement amount. You may find this option useful for budgeting purposes. If you choose this option, the minimum pension supplement amount accrues daily during the quarter and is paid as soon as possible after 20 March, 20 June, 20 September and 20 December with your fortnightly pension payment.  
The option to get the minimum pension supplement as a fortnightly payment or quarterly payment can be changed at any time.

How often do you wish to receive the minimum pension supplement amount?

- Fortnightly
- Quarterly

**You**

**33 Read this before answering the following questions.**

You may not be paid if you do not give us your tax file number (TFN). If you do not have a TFN, or do not know what yours is, you can apply for one through the Australian Taxation Office.

In giving us your TFN in relation to this claim you authorise us to use your TFN for other social security payments and services in future where necessary.

Have you given us your tax file number before?

No  Go to next question

Not sure  Go to next question

Yes  **Go to 35**

**34 Do you have a tax file number?**

No  Go to **ato.gov.au**

Yes  Your tax file number

**35 Read this before answering the following question.**

If you think you will have to pay tax this year, you can ask us to deduct tax instalments from your taxable payment.

You can change or cancel your tax deduction at any time using your Centrelink online account.

If you are not sure how much tax to have taken out of your payment, contact the Australian Taxation Office.

Do you want tax taken out each fortnight?

No  Go to next question

Yes  Give details below

**Tick one only**

A set amount (must be whole dollars)  \$  .00 per fortnight

A percentage (%) of my payment   % per fortnight

**Your partner**

**33 Read this before answering the following questions.**

You may not be paid if you do not give us your tax file number (TFN). If you do not have a TFN, or do not know what yours is, you can apply for one through the Australian Taxation Office.

In giving us your TFN in relation to this claim you authorise us to use your TFN for other social security payments and services in future where necessary.

Have you given us your tax file number before?

No  Go to next question

Not sure  Go to next question

Yes  **Go to 35**

**34 Do you have a tax file number?**

No  Go to **ato.gov.au**

Yes  Your tax file number

**35 Read this before answering the following question.**

**Only answer this question if you are also claiming Age Pension on this form.**

If you think you will have to pay tax this year, you can ask us to deduct tax instalments from your taxable payment.

You can change or cancel your tax deduction at any time using your Centrelink online account.

If you are not sure how much tax to have taken out of your payment, contact the Australian Taxation Office.

Do you want tax taken out each fortnight?

No  Go to next question

Yes  Give details below

**Tick one only**

A set amount (must be whole dollars)  \$  .00 per fortnight

A percentage (%) of my payment   % per fortnight



## Your living arrangements

- 43** Do you share your accommodation with anyone other than an immediate family member?

Immediate family members are parents (including step-parent and legal guardian), sibling, step-sibling, child (including adopted, step child or foster child), grandparent or grandchild.

- No  ► **Go to 45**  
Yes  ► *Go to next question*

- 44** **Read** this before answering the following question.

We need full details about your living arrangements to work out your correct payment.

The answers to these questions will help us decide if further supporting documentation is needed from you. If you are making a claim, you must return any supporting documents at the same time you lodge your claim form.

Give details of each person who shares your accommodation.

### Include anyone who:

- regularly stays any number of nights per week
- uses your home as a base (for example, truck drivers, miners, flight attendants or members of the armed forces).

**Do not include** immediate family members.

## Person 1

Full name

Age

When did you start sharing with this person (DD MM YYYY)?

What is your relationship to this person?

- A** Have you and this person shared accommodation at another address?

- No   
Yes

- B** Do you and this person share the parenting/guardianship of any children?

- No   
Yes

## Person 1

- C** Have you and this person ever had any joint financial commitments (for example, joint bank account, mortgage or other loans)?


- No   
Yes

- D** If you participate in activities jointly with this person, are you considered to be a couple?

- No   
Yes

- E** Have you and this person previously lived together as a couple (for example, married, partnered, de facto or in a registered relationship)?


- No  ► **Go to F**  
Yes  ►

 **Both you and your ex-partner** each need to complete and return a separate **Relationship details – Separated under one roof (SS293)** form.

If you do not have this form, go to [servicessaustralia.gov.au/forms](https://servicessaustralia.gov.au/forms)  
► **Go to G**

- F** Did you answer 'Yes' at B, C or D, for this person?

- No  ► **Go to H**  
Yes  ►

 **Both you and the other person** each need to complete and return a separate **Relationship details (SS284)** form.

If you do not have this form, go to [servicessaustralia.gov.au/forms](https://servicessaustralia.gov.au/forms)  
► **Go to G**

- G** Are you concerned about your safety if forms are issued to this person?

- No  ► **Go to H**  
Yes  ►

If you have been advised to provide a **Relationship Details – Separated under one roof (SS293)** form or a **Relationship Details (SS284)** form then only you need to complete the form. You do not need to request your ex-partner or the other person to complete the form.

► **Go to H**

- H** Is there another person who shares your accommodation?

- No  ► **Go to 45 on page 14**  
Yes  ► Give details of **Person 2**

## Person 2

Full name

Age

When did you start sharing with this person  
(DD MM YYYY)?

What is your relationship to this person?

**A** Have you and this person shared accommodation at another address?

No

Yes

**B** Do you and this person share the parenting/guardianship of any children?

No

Yes

**C** Have you and this person ever had any joint financial commitments (for example, joint bank account, mortgage or other loans)?

No

Yes

**D** If you participate in activities jointly with this person, are you considered to be a couple?


No

Yes

**E** Have you and this person previously lived together as a couple (for example, married, partnered, de facto or in a registered relationship)?

No  **Go to F**

Yes

 **Both you and your ex-partner** each need to complete and return a separate **Relationship details – Separated under one roof (SS293)** form.

If you do not have this form, go to [servicesaustralia.gov.au/forms](https://servicesaustralia.gov.au/forms)


▶ **Go to G**

## Person 2

**F** Did you answer 'Yes' at B, C or D, for this person?

No  **Go to H**

Yes

 **Both you and the other person** each need to complete and return a separate **Relationship details (SS284)** form.

If you do not have this form, go to [servicesaustralia.gov.au/forms](https://servicesaustralia.gov.au/forms)

▶ **Go to G**

**G** Are you concerned about your safety if forms are issued to this person?

No  **Go to H**

Yes


If you have been advised to provide a **Relationship Details – Separated under one roof (SS293)** form or a **Relationship Details (SS284)** form then only you need to complete the form. You do not need to request your ex-partner or the other person to complete the form.

▶ **Go to H**

**H** Is there another person who shares your accommodation?

No  *Go to next question*

Yes

 Provide a separate sheet with full details of each additional person.

▶ *Go to next question*

## About your home

The answers to these questions are used to work out your rate of payment and eligibility for rent assistance.

**45** Do you (and/or your partner) own a home that you do not live in?

No  **Go to 47**

Yes  *Go to next question*

**46** What is the reason you (and/or your partner) do not live in the home?

You or your children are studying

Receiving medical treatment

Receiving care from a person in a private home

Receiving care in a nursing home

Providing care to a person in a private home

Overseas absence

Other  **Give details below**

**47** Have you (and/or your partner) sold your former home within the last 24 months and intend to buy or build a new family home?

No  *Go to next question*


Yes  **Give details below**

What was the date of settlement?

(DD MM YYYY)

What was the amount you received after any mortgage and costs were taken out of the sale price?

\$

 Provide documents to verify the details of the sale (for example, settlement statement). Copies are acceptable.

What is the total amount you (and/or your partner) intend to use to buy or build your new family home (cannot exceed the amount of the sale proceeds)?

\$

If you are a member of a couple, what share of the intended amount do you and your partner each have invested?

You	Your partner
\$ <input type="text"/>	\$ <input type="text"/>

Expected date of purchase or completion of your new family home

(DD MM YYYY)

**48** What type of accommodation best describes where you (and your partner) live?

In a place where you (and/or your partner) pay private rent – this includes when you live in a caravan park and pay site fees or live on a vessel and pay mooring fees  **Go to 70**

In a home you (and/or your partner) own or you own jointly with another person – this can include:

- paying it off (mortgage)
- a caravan, mobile home or boat  **Go to 49**

In a home owned by:

- a company in which you (and/or your partner) are a shareholder or director
- a trust in which you (and/or your partner) or a member of your family are a potential beneficiary or are named in the trust deed  **Go to 79**

In public housing, for example, housing owned by the Housing Authority. This does not include paying rent to a community housing organisation.  **Go to 50**

In a boarding house, guest house, hostel, hotel, campus, refuge, emergency or supported accommodation or similar  **Go to 72**

In a hospital or home for people with disabilities  **Go to 72**

In an aged care home or nursing home  **Go to 53**

In a retirement village  **Go to 60**

In accommodation which you (and/or your partner) have the right to use for life  **Go to 64**

In accommodation where you pay no rent  **Go to 79**

Other, for example, this could be where you (and/or your partner) do not have a fixed address  **Give details below**

**49** Do you pay site or mooring fees for your (and your partner's) home (this could be for a caravan, mobile home or boat)?

No  **Go to 79**

Yes  **Go to 70**

**50** Is your (or your partner's) name on the rental contract or lease agreement?

No  *Go to next question*

Yes  **Go to 79**

51 Is the primary tenant paying the market rate of rent?

No  Go to next question

Not sure  Go to next question

Yes  Go to 70

52 Do you (and your partner) live with the primary tenant and your (and/or your partner's) income has been taken into account by the public housing authority when calculating the rent?

No  Go to 79

Yes  Go to 70

**Aged care home or nursing home**

53 What is the name of the aged care home or nursing home?

54 What date did you (and/or your partner) move in?

You

(DD MM YYYY)

Your partner

(DD MM YYYY)

55 How long will you (and/or your partner) be staying?

Long term or indefinitely

You  Your partner  Go to 57

Short term or temporary respite care

You  Your partner  Go to next question

56 What date do you (and/or your partner) expect to leave?

You

(DD MM YYYY)

Your partner

(DD MM YYYY)

Go to 79

57 Read this before answering the following question.

Payments for accommodation may include:

- Accommodation Bond
- Accommodation Charge
- Refundable Accommodation Deposit (RAD)
- Daily Accommodation Payment (DAP)
- Daily Accommodation Contribution (DAC)
- Refundable Accommodation Contribution (RAC).

Did you (and/or your partner) pay, or agree to pay, a daily payment or a lump sum (either by instalments or in full) for your accommodation to the Aged Care Provider?

This payment may have been a donation, a loan or some type of payment which may be repayable to you in whole or in part, if you leave. This payment does not include gifts or loans above the amount you had to pay for the right to your accommodation.

No  Go to 79

Yes  Amount of payment

\$

Provide a copy of the signed accommodation agreement(s).

58 Did you (and/or your partner) make a gift and/or loan in addition for the right to your accommodation?

No  Go to 79

Yes  Go to next question

59 What was the additional amount paid as a gift and/or loan?

Amount of gift

\$

Amount of loan

\$

Go to 79







## Living with other people

Sharing your accommodation means that you have the right to use a kitchen, bedroom or bathroom with one or more persons. This includes **all** family members (except your partner and dependent children), people who regularly stay at your accommodation and people who work away from home, for example, truck drivers, miners, flight attendants or members of the armed forces.

**70** Do you (and your partner) share your accommodation with other people?

No  **Go to 72**

Yes  Give details below

**1** Person's name

Age Date they moved in (DD MM YYYY)

Relationship to you Do they own the home?

 No  Yes 

**Their share** of the rent/lodgings

 \$ per

**2** Person's name

Age Date they moved in (DD MM YYYY)

Relationship to you Do they own the home?

 No  Yes 

**Their share** of the rent/lodgings

 \$ per

**3** Person's name

Age Date they moved in (DD MM YYYY)

Relationship to you Do they own the home?

 No  Yes 

**Their share** of the rent/lodgings

 \$ per

If you need more space, provide a separate sheet with details.

**71** Do you (and your partner) share your accommodation with one or more of your children who receive a Centrelink payment, ABSTUDY or a service pension but they do **not** receive Rent Assistance?

No

Yes

## Paying for accommodation

**72** Do you (and your partner) pay board and/or lodgings?

Board means you (and your partner) are provided with some regular meals.

Lodgings means the amount you (and your partner) pay for your accommodation.

No  **Go to 74**

Yes  Go to next question

**73** Can you separate the amounts you (and your partner) pay for board and/or lodgings?

No  Total board and lodgings charged per day, week, fortnight, 4 weeks or calendar month

 \$ per

**Go to 75**

Yes  Amount paid for board (meals) per day, week, fortnight, 4 weeks or calendar month

 \$ per

Amount paid for lodgings (accommodation only) per day, week, fortnight, 4 weeks or calendar month

 \$ per

**Go to 75**

**74** What is the amount **you** (and **your partner**) pay per day, week, fortnight, 4 weeks or calendar month, for example, rent, maintenance or site fees?

This would be the total you (and your partner) pay for the property minus any subsidy/rebate, rent amount claimed as a business expense for taxation purposes **or** contribution from another person or organisation.

 \$ per

**75** On what date did you (and your partner) start paying these fees?

   (DD MM YYYY)

76 What type of accommodation do you (and your partner) live in?

- Boarding house/hostel/private hotel, hospital or disability housing  **Go to 78**
- Private house or townhouse/unit/flat
- Community housing
- Defence housing  *Go to next question*
- Caravan/cabin/mobile home
- Boat
- Other  Give details below

▶ *Go to next question*

77 What is the **total amount** being charged per day, week, fortnight, 4 weeks or calendar month?

\$  per


78 Do you (and/or your partner) have a formal lease or tenancy agreement?

No  *Go to next question*

Yes   Provide a full copy of your signed lease or tenancy agreement.

## Other income

79 Are you (and/or your partner) permanently blind?

No   You will need to complete and return the **Income and Assets (SA369)** form. If you do not have this form, go to **servicesaustralia.gov.au/forms** ▶ **Go to 90**


Yes   You will need to complete and return the **Request for Ophthalmologist/Optometrist Report (SA013)** form for each person claiming Age Pension for people who are permanently blind. If you do not have this form, go to **servicesaustralia.gov.au/forms**

80 Indicate who is permanently blind

**Tick one only**

Both (you and your partner)  **Go to 82**

- You  • If you do **not** have a partner, **Go to 83**  
• If you do have a partner, **Go to 81**

Your partner   You will need to complete and return the **Income and Assets (SA369)** form. If you do not have this form, go to **servicesaustralia.gov.au/forms** ▶ **Go to 90**

81 Is your partner claiming or receiving a Centrelink payment?

No  *Go to next question*

Yes   You will need to complete and return the **Income and Assets (SA369)** form. If you do not have this form, go to **servicesaustralia.gov.au/forms** ▶ **Go to 90**


82 Are you (and/or your partner) claiming Rent Assistance?

No  *Go to next question*

Yes   You will need to complete and return the **Income and Assets (SA369)** form. If you do not have this form, go to **servicesaustralia.gov.au/forms** ▶ **Go to 90**

83 Are you (and/or your partner) receiving any payment from the New Zealand government?

No  *Go to next question*

Yes   Provide a copy of a letter or document which gives the reference number and details of each payment.

84 Are you (and/or your partner) receiving any payment from the Department of Veterans' Affairs?

No  Go to 86

Yes  Go to next question

85 Which payment do you (and/or your partner) receive from the Department of Veterans' Affairs?

**Tick all that apply**

Income Support Supplement


Service Pension

War Widow's Pension

War Widower's Pension

Other


Not sure

 Provide a copy of a letter or other document which gives the reference number and details of each payment.

86 Do you (and/or your partner) receive Self-Employment Allowance?

No  Go to next question

Yes

 Provide a copy of a letter or other document(s) that shows the reference number and details for the payment (other than payments made by us).

## Compensation

87 Read this before answering the following question.

### Compensation, insurance and damages include:

- workers' compensation
- motor vehicle
- criminal injuries/victims compensation
- sporting injury
- public liability
- medical negligence
- personal accident and sickness insurance
- income replacement insurance.

Have you (or your partner) ever:

- received
- claimed, or
- been able to claim

compensation, insurance and/or damages?

No  Go to 89

Yes  Go to next question

88 Have you (or your partner) told us about this before?

No

 You will need to complete and return a **Compensation and damages (Mod C)** form.  
If you do not have this form, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

Yes  Go to next question

89 Do you (and/or your partner) receive payments from an income protection policy?

No  Go to next question

Yes

 Provide a copy of the policy document and the latest statement for this policy.

## Checklist

- 90** Which of the following forms and/or documents are you (and/or your partner) providing with this form?

Where you are asked to supply documents, provide original documents. In some circumstances copies may be accepted, as detailed in the below checklist.

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

Identity documents Each person claiming Age Pension may be required to provide identity documents. (Refer to 'Confirming your identity' in the <b>Information Booklet</b> )	<input type="checkbox"/>
Proof of date of birth (if required at <b>question 6</b> )	<input type="checkbox"/>
<b>Authorising a person or organisation to enquire or act on your behalf (SS313)</b> form (if you answered Yes at <b>question 18</b> )	<input type="checkbox"/>
Proof of Australian residence status (if you answered No at <b>question 21</b> )	<input type="checkbox"/>
<b>Relationship details – Separated under one roof (SS293)</b> form (Both you and your ex-partner (for each <b>Person 1</b> and/or <b>Person 2</b> ), if you answered Yes at <b>question 44 E</b> and No at <b>question 44 G</b> or only you, if you answered Yes at <b>question 44 E</b> and Yes at <b>question 44 G</b> )	<input type="checkbox"/>
<b>Relationship details (SS284)</b> form (Both you and the other person (for each <b>Person 1</b> and/or <b>Person 2</b> ), if you answered Yes at <b>question 44 F</b> and No at <b>question 44 G</b> or only you, if you answered Yes at <b>question 44 F</b> and Yes at <b>question 44 G</b> )	<input type="checkbox"/>
Details of each additional person who shares your accommodation (if you answered Yes at <b>question 44 H</b> )	<input type="checkbox"/>
Copies of documents to verify the details of the sale of your former home (for example, settlement statement) (if you answered Yes at <b>question 47</b> )	<input type="checkbox"/>
Copy of the signed accommodation agreement(s) (if you answered Yes at <b>question 57</b> )	<input type="checkbox"/>
Copy of the signed contract or agreement (if you answered Yes at <b>question 61</b> )	<input type="checkbox"/>
Signed lease or tenancy agreement (if you answered Yes at <b>question 78</b> )	<input type="checkbox"/>
<b>Request for Ophthalmologist/Optomtrist Report (SA013)</b> form (if you answered Yes at <b>question 79</b> )	<input type="checkbox"/>

## Continued

<b>Income and Assets (SA369)</b> form (if you answered No at <b>question 79</b> , or if you answered Your partner at <b>question 80</b> , or if you answered Yes at <b>question 81</b> or <b>82</b> )	<input type="checkbox"/>
Copy of a letter or document which gives the reference number and details of each New Zealand payment (if you answered Yes at <b>question 83</b> )	<input type="checkbox"/>
Copy of a letter or document which gives details of Department of Veterans' Affairs payment(s) and reference number(s) (if required for <b>question 85</b> )	<input type="checkbox"/>
Copy of a letter or document which gives the reference number and details of the Self-Employment Allowance (if you answered Yes at <b>question 86</b> )	<input type="checkbox"/>
<b>Compensation and damages (Mod C)</b> form (if you answered Yes at <b>question 88</b> )	<input type="checkbox"/>
Copy of the policy document and the latest statement for this policy (if you answered Yes at <b>question 89</b> )	<input type="checkbox"/>

## Privacy notice

### 91 You (and your partner) need to read this

#### Privacy and your personal information

The privacy and security of your personal information is important to us, and is protected by law. We collect this information so we can process and manage your applications and payments, and provide services to you. We only share your information with other parties where you have agreed, or where the law allows or requires it. For more information, go to [servicesaustralia.gov.au/privacy](https://servicesaustralia.gov.au/privacy)

### 92 Declaration

#### I/We declare that:

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

#### I/We understand that:

- I/we must return **all** supporting documents at the same time as I/we lodge my/our claim form. If I/we do not return all documents, Centrelink cannot process my/our claim.
- I/we must notify Centrelink of any changes to this information **within 14 days** of the change(s) occurring.
- Centrelink can make relevant enquiries to make sure I/we receive the correct entitlement.
- giving false or misleading information is a serious offence.

#### If this is a claim for both you and your partner

#### I/We agree that:

- the primary claimant (the person listed first on this form) will receive all letters from Centrelink about the combined claim and respond to those letters for both of us.
- where we already have or nominate a Correspondence nominee that they will be receiving copies of all letters in relation to the combined claim.

Your signature

Date (DD MM YYYY)

Your partner's signature

Date (DD MM YYYY)

### 93 Read this before answering the following question.

The following question asks whether you (and/or your partner) wish to claim the Pension Bonus.

To be paid a Pension Bonus you must be a registered member of the Pension Bonus Scheme. The scheme is closed to new registrations. You must claim the Pension Bonus at the same time you claim Age Pension. When claiming your Pension Bonus timing is important. If you have any questions or concerns, call us on **132 300** and ask to talk to a Financial Information Service Officer.

For more information, go to

[servicesaustralia.gov.au/pensionbonusscheme](https://servicesaustralia.gov.au/pensionbonusscheme)

Are you (and/or your partner) a registered member of the Pension Bonus Scheme?

No  You (and/or your partner) are not eligible for a Pension Bonus. If you (and/or your partner) have answered all questions relating to the Claim for Age Pension you (and/or your partner) have completed the form.

Yes  *Go to next question*

### 94 Are you (and/or your partner) a registered member with the Department of Veterans' Affairs?

No  *Go to next question*

Yes  Give details below

#### You

What is your Pension Bonus file number, with the Department of Veterans' Affairs?

#### Your partner

What is your Pension Bonus file number, with the Department of Veterans' Affairs?

*Go to next question*

## Returning this form

Return this form and any supporting documents:

- online** (excluding identity documents) using your Centrelink online account. For more information, go to [servicesaustralia.gov.au/centrelinkuploaddocs](https://servicesaustralia.gov.au/centrelinkuploaddocs)
- by post to  
Services Australia  
Seniors Services  
PO Box 7808  
CANBERRA BC ACT 2610
- in person at one of our service centres.

**This page has been left blank intentionally.**

## Pension Bonus

**STOP** Complete the following questions only if you (and/or your partner) are already registered in the Pension Bonus Scheme and now wish to claim. Do not answer these questions if you (and/or your partner) are only claiming Age Pension.

### You

- 1 Have you previously claimed or received a Pension Bonus from the Department of Veterans' Affairs or Centrelink?

No  Go to next question

Yes  Date paid or date rejected

(DD MM YYYY)

- 2 Has your relationship status changed since your Pension Bonus Scheme registration date?

No  Go to next question

Yes  Give details below

1 Relationship status Date from (DD MM YYYY)

Partner's name (when applicable)

2 Relationship status Date from (DD MM YYYY)

Partner's name (when applicable)

- 3 **Read** this before answering the following questions about the work test.

The **work test** for the Pension Bonus Scheme requires you to complete at least 960 hours of gainful work each year. This is an average of 20 hours per week for 48 weeks each year. At least 640 of these hours must have been worked in Australia. For more information, go to [servicessaustralia.gov.au/pensionbonusscheme](http://servicessaustralia.gov.au/pensionbonusscheme)

- 4 When did you stop meeting the work test?

(DD MM YYYY)

- 5 Are you claiming a bonus on the basis of your work?

No

Yes

- 6 Are you claiming a bonus on the basis of your partner's work?

No

Yes

Not applicable (no partner)

### Your partner

- 1 Have you previously claimed or received a Pension Bonus from the Department of Veterans' Affairs, or Centrelink?

No  Go to next question

Yes  Date paid or date rejected

(DD MM YYYY)

- 2 Has your relationship status changed since your Pension Bonus Scheme registration date?

No  Go to next question

Yes  Give details below

1 Relationship status Date from (DD MM YYYY)

Partner's name (when applicable)

2 Relationship status Date from (DD MM YYYY)

Partner's name (when applicable)

- 3 **Read** this before answering the following questions about the work test.

The **work test** for the Pension Bonus Scheme requires you to complete at least 960 hours of gainful work each year. This is an average of 20 hours per week for 48 weeks each year. At least 640 of these hours must have been worked in Australia. For more information, go to [servicessaustralia.gov.au/pensionbonusscheme](http://servicessaustralia.gov.au/pensionbonusscheme)

- 4 When did you stop meeting the work test?

(DD MM YYYY)

- 5 Are you claiming a bonus on the basis of your work?

No

Yes

- 6 Are you claiming a bonus on the basis of your partner's work?

No

Yes

An **evidentiary certificate** is a letter issued by us which certifies that you (or your partner) have been an accruing member of the scheme for a bonus period because you (and/or your partner) have met the work test.  
 If you (and/or your partner) are providing work records you will need to provide evidence such as payment summaries (group certificates), income tax returns, time sheets or the completed work record(s). You can get a copy of the *Work record for the Pension Bonus Scheme* by going to [servicessaustralia.gov.au/pensionbonusscheme](http://servicessaustralia.gov.au/pensionbonusscheme)

7 Provide details about the work you have done to meet the work test.

**1** Worked from (DD MM YYYY)  
   Evidentiary certificate   
 Worked to (DD MM YYYY) **or**  
   Work record

**2** Worked from (DD MM YYYY)  
   Evidentiary certificate   
 Worked to (DD MM YYYY) **or**  
   Work record

**3** Worked from (DD MM YYYY)  
   Evidentiary certificate   
 Worked to (DD MM YYYY) **or**  
   Work record

**4** Worked from (DD MM YYYY)  
   Evidentiary certificate   
 Worked to (DD MM YYYY) **or**  
   Work record

**5** Worked from (DD MM YYYY)  
   Evidentiary certificate   
 Worked to (DD MM YYYY) **or**  
   Work record

8 Since your Pension Bonus Scheme registration date have you claimed or received a Carer Payment from us or a Carer Service Pension from the Department of Veterans' Affairs?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

7 Provide details about the work you have done to meet the work test.

**1** Worked from (DD MM YYYY)  
   Evidentiary certificate   
 Worked to (DD MM YYYY) **or**  
   Work record

**2** Worked from (DD MM YYYY)  
   Evidentiary certificate   
 Worked to (DD MM YYYY) **or**  
   Work record

**3** Worked from (DD MM YYYY)  
   Evidentiary certificate   
 Worked to (DD MM YYYY) **or**  
   Work record

**4** Worked from (DD MM YYYY)  
   Evidentiary certificate   
 Worked to (DD MM YYYY) **or**  
   Work record

**5** Worked from (DD MM YYYY)  
   Evidentiary certificate   
 Worked to (DD MM YYYY) **or**  
   Work record

8 Since your Pension Bonus Scheme registration date have you claimed or received a Carer Payment from us or a Carer Service Pension from the Department of Veterans' Affairs?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)



**You**

- 9** Since your Pension Bonus Scheme registration date have you received Community Development Employment Projects (CDEP) wages?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

- 10** Since your Pension Bonus Scheme registration date have you been imprisoned?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

- 11** Since your Pension Bonus Scheme registration date have you undergone psychiatric confinement because you were charged with committing an offence?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

- 12** Since your Pension Bonus Scheme registration date have you been unable to meet the work test due to the death of your partner?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

- 13** Since your Pension Bonus Scheme registration date have you received periodic or lump sum compensation payments?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**Your partner**

- 9** Since your Pension Bonus Scheme registration date have you received Community Development Employment Projects (CDEP) wages?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

- 10** Since your Pension Bonus Scheme registration date have you been imprisoned?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

- 11** Since your Pension Bonus Scheme registration date have you undergone psychiatric confinement because you were charged with committing an offence?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

- 12** Since your Pension Bonus Scheme registration date have you been unable to meet the work test due to the death of your partner?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

- 13** Since your Pension Bonus Scheme registration date have you received periodic or lump sum compensation payments?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**You**

**14** Since your Pension Bonus Scheme registration date have you been unable to meet the work test due to a major disaster (for example, Cyclone Larry, the Queensland floods or Victorian bushfires)?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**15** Since your Pension Bonus Scheme registration date have you taken any form of paid or unpaid leave (for example, family, recreation, sick, long service, carer)?

No  Go to next question

Yes  Give details below

**1** Type of leave

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**2** Type of leave

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**Your partner**

**14** Since your Pension Bonus Scheme registration date have you been unable to meet the work test due to a major disaster (for example, Cyclone Larry, the Queensland floods or Victorian bushfires)?

No  Go to next question

Yes  Give details below

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**15** Since your Pension Bonus Scheme registration date have you taken any form of paid or unpaid leave (for example, family, recreation, sick, long service, carer)?

No  Go to next question

Yes  Give details below

**1** Type of leave

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**2** Type of leave

Date from (DD MM YYYY)

Date to (DD MM YYYY)

**You**

- 16** In the period from 5 years before your registration date for the Pension Bonus Scheme until now, have you given away any money or other assets, or sold assets for less than their market value?

No  Go to next question

Yes  Give details below

**1** What did you give away or sell?

Date of gift/sale (DD MM YYYY)

What was it worth?

How much did you get for it?

 \$

 \$
**2** What did you give away or sell?

Date of gift/sale (DD MM YYYY)

What was it worth?

How much did you get for it?

 \$

 \$
**3** What did you give away or sell?

Date of gift/sale (DD MM YYYY)

What was it worth?

How much did you get for it?

 \$

 \$

If you need more space, provide a separate sheet with details.

**Your partner**

- 16** In the period from 5 years before your registration date for the Pension Bonus Scheme until now, have you given away any money or other assets, or sold assets for less than their market value?

No  Go to next question

Yes  Give details below

**1** What did you give away or sell?

Date of gift/sale (DD MM YYYY)

What was it worth?

How much did you get for it?

 \$

 \$
**2** What did you give away or sell?

Date of gift/sale (DD MM YYYY)

What was it worth?

How much did you get for it?

 \$

 \$
**3** What did you give away or sell?

Date of gift/sale (DD MM YYYY)

What was it worth?

How much did you get for it?

 \$

 \$

If you need more space, provide a separate sheet with details.

## You

- 17** You need to provide all documents that provide details about the work you have done to meet the work test (for example, payment summaries, income tax returns, time sheets, completed work records or evidentiary certificates).

### Privacy notice

#### 18 You need to read this

##### Privacy and your personal information

The privacy and security of your personal information is important to us, and is protected by law. We collect this information so we can process and manage your applications and payments, and provide services to you. We only share your information with other parties where you have agreed, or where the law allows or requires it. For more information, go to [servicesaustralia.gov.au/privacy](https://servicesaustralia.gov.au/privacy)

#### 19 Declaration

##### I declare that:

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

##### I understand that:

- I must return **all** supporting documents at the same time as I lodge my claim form. If I do not return all documents, Centrelink cannot process my claim.
- Centrelink can make relevant enquiries to make sure I receive the correct entitlement.
- giving false or misleading information is a serious offence.

Your signature



Date (DD MM YYYY)

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## Your partner

- 17** You need to provide all documents that provide details about the work you have done to meet the work test (for example, payment summaries, income tax returns, time sheets, completed work records or evidentiary certificates).

### Privacy notice

#### 18 You need to read this

##### Privacy and your personal information

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#### 19 Declaration

##### I declare that:

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

##### I understand that:

- I must return **all** supporting documents at the same time as I lodge my claim form. If I do not return all documents, Centrelink cannot process my claim.
- Centrelink can make relevant enquiries to make sure I receive the correct entitlement.
- giving false or misleading information is a serious offence.

Your signature



Date (DD MM YYYY)

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### Returning this form

Return this form and any supporting documents:

- **online** (excluding identity documents) using your Centrelink online account. For more information, go to [servicesaustralia.gov.au/centrelinkuploaddocs](https://servicesaustralia.gov.au/centrelinkuploaddocs)
- by post to  
Services Australia  
Seniors Services  
PO Box 7808  
CANBERRA BC ACT 2610
- in person at one of our service centres.