

Support at Home calculation of your cost of care

Online account



Completing this form online is faster and easier.

Access your Centrelink online account through myGov and select **Payments and claims**, then **Claims** and **Make a claim**.

If you do not have a myGov account, you can create one at **my.gov.au** and then link Centrelink to it.

Do not complete this form online if you receive a Department of Veterans' Affairs means tested income support payment. For more information, call DVA on 1800 VETERAN (**1800 838 372**).

About this form



We understand that seeking Support at Home services can be a sensitive time.

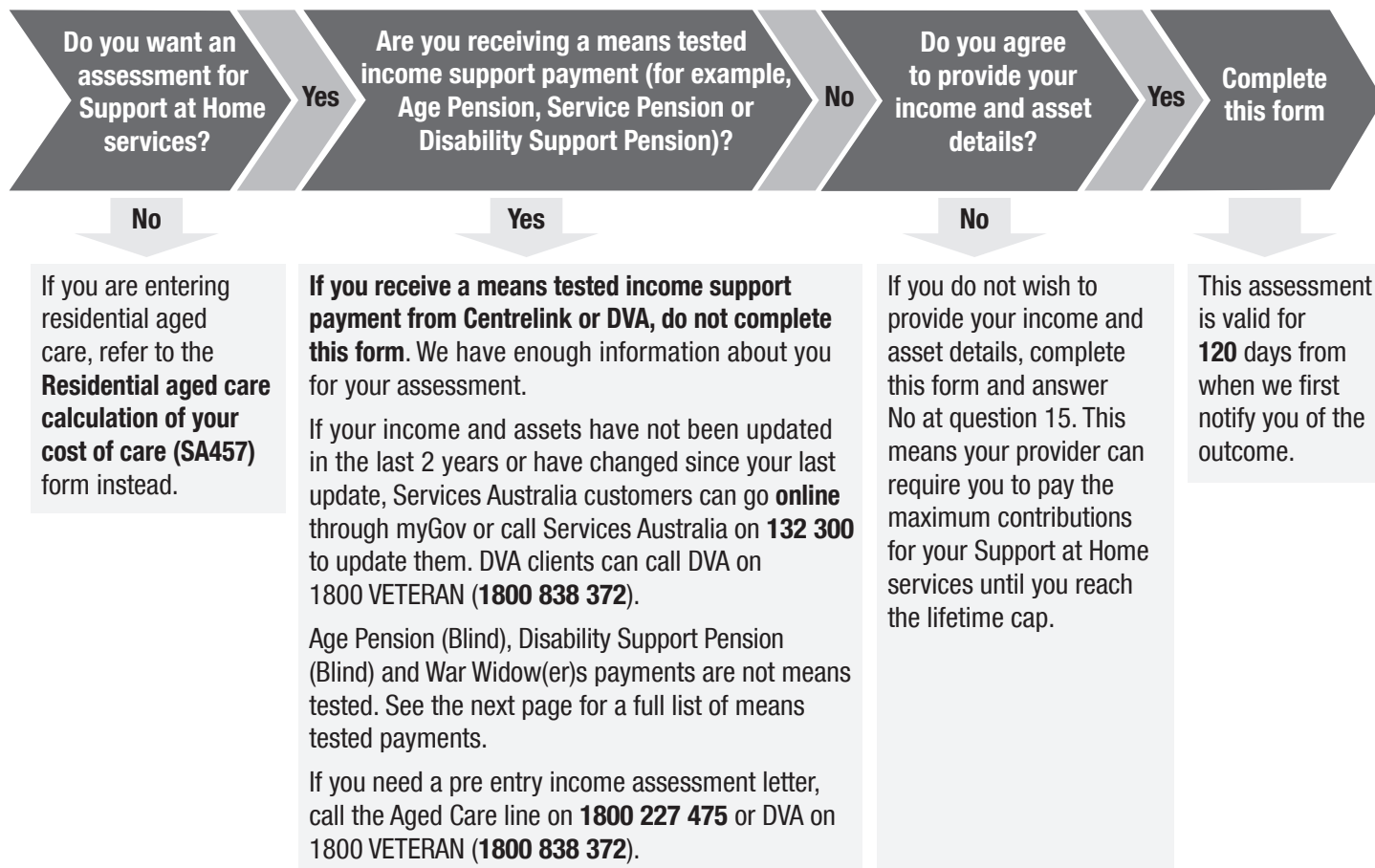
If you are seeking Support at Home services, the Australian Government may subsidise your cost of care. **This form collects details of your income and assets so we can calculate the amount you will contribute towards your Support at Home services.**

Other help available

We have **Aged Care Specialist Officers (ACSOs)** who provide in-depth information about your aged care option, including financial aspects of aged care. Go to **servicesaustralia.gov.au/myagedcarefacetoface** or call us on **1800 227 475** to find out if there is an ACSO near you, and to book an appointment. Staff in our service centres can also help you with general aged care information.

You can speak to a **Financial Information Service Officer (FISO)** who can help you understand your financial choices. Call us on **132 300** and say **Financial Information Service** when we ask why you are calling. For more information, go to **servicesaustralia.gov.au/fis**

When to use this form



Keep these Notes (pages 1 to 5) for your information.

Fee estimator

You can get an estimate of the amount you may be asked to pay towards your Support at Home services by going to myagedcare.gov.au and searching for **fee estimator**.

For more information



Go to servicesaustralia.gov.au/agedcare or call us on **1800 227 475**.

Information in your language

We can translate documents you need to give us for free.

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

Hearing and speech assistance

If you have a hearing or speech impairment, you can use:

- the National Relay Service **1800 555 660**, or
- our TTY service on **1800 810 586**. You need a TTY phone to use this service.

For more information about help with communication, go to servicesaustralia.gov.au and search 'other support and advice'.

The information below will help you answer questions in this form.

Calculating your cost of care

All Support at Home participants may be asked to pay a contribution towards the cost of their care based on their financial situation. You will only pay a contribution on the services you have received.

This form is used to calculate the amount you will pay towards your cost of care.

There is a lifetime cap that applies to the contributions paid for Support at Home services by care recipients who started in-home care on or after 1 July 2014. Services Australia will write to you and your service provider once you have reached the lifetime cap.

The collection of your (and/or your partner's) personal information on this form is voluntary.

Services Australia collects this information to calculate your cost of care, to undertake assessments to determine the contributions payable by care recipients, and government subsidies payable to approved aged care service providers, under the *Aged Care Act 2024*.

Without this information the care recipient will pay the maximum contributions for Support at Home services. All information collected by Services Australia can be accessed:

- through your Centrelink online account by signing in to myGov
- by calling the Aged Care line on **1800 227 475** or DVA on 1800 VETERAN (**1800 838 372**).

Services Australia only shares information with other parties where you have agreed, or where the law allows or requires it. For more information, go to servicesaustralia.gov.au/privacypolicy

Centrelink or Department of Veterans' Affairs payments

Means tested payments may include:

- Age Pension
- Disability Support Pension
- Carer Payment (not including Carer Allowance)
- Special Benefit
- Service Pension
- Income Support Supplement
- Veterans Payment
- Farm Household Allowance.

Non-means tested payments may include:

- Age Pension (Blind)
- Disability Support Pension (Blind)
- War Widow(er)s Pension
- Disability Compensation Payment paid by DVA (not including income support supplement)
- Service Pension (Blind) paid by DVA.

Continued

Who should complete this form?

If you are not receiving a Centrelink or DVA payment **or** you are receiving a Centrelink or DVA **non-means tested** payment listed on page 2 of the **Notes**, you will need to complete this form if you want us to calculate your means tested cost of care. If you do not complete this form, your cost of care will not be adjusted to reflect your income and assets.

Who should *not* complete this form?

Do not complete this form if you are receiving one of the Centrelink or DVA **means tested** payments listed on page 2 of the **Notes**, and:

- you have updated your income and assets within the last 2 years, or
- your income and assets have not changed since you last provided an update.

We have enough information about you to complete your assessment.

If your income and assets have not been updated in the last 2 years or have changed since you last made an update, Services Australia customers can go **online** through myGov or call Services Australia on **132 300** to update them. DVA clients can complete this form or call DVA on 1800 VETERAN (**1800 838 372**).

Important information for Australian ex-prisoner of war or Victoria Cross recipients

If you are an Australian ex-prisoner of war or Victoria Cross recipient, you may not need to complete this form. Contact DVA on **133 254**. If you live in regional Australia call DVA on 1800 VETERAN (**1800 838 372**).

**Income for the
purposes of
Support at Home**

Income, for the purposes of Support at Home, is not the same as taxable income. Your assessed income includes:

- deemed income from financial assets
- gross employment income
- income received to provide care
- net income from business, including farms
- family trust distributions or dividends from private company shares
- income attributable to the controllers of a private trust or private company
- income from rental property
- income from a life interest
- income from boarders and lodgers (other than immediate family)
- superannuation and pensions from countries other than Australia
- income from income stream products, such as superannuation pensions and annuities.

If you have a partner, you will be asked to answer questions about your combined income. Your income will be assessed as half of the total combined income, regardless of whose name it is in.

Financial investments deemed to be earning income include bank accounts and other financial investments. It is important you tell us about all the bank accounts and financial investments you (and/or your partner) have no matter what income they are actually earning.

Money or assets that you (and/or your partner) have given away in the last 5 years, may be considered to earn income.

You have not gifted more than \$10,000 in the current financial year, or more than \$30,000 over 5 financial years (this cannot include more than \$10,000 in a single financial year).

Gifts over these amounts will be considered an asset that is deemed to be earning income, in your assessment.

Assets for the purposes of Support at Home

Most property and items you (and/or your partner) own or have an interest in, including assets held outside Australia.

The value of your assets is what you would get for them if you sold them at market value.

Generally, any debt secured against an asset is deducted from the value of that asset.

Your assets may include:

- rental properties, farms, second or holiday houses
- cars, caravans, boats or trailers
- home contents and personal effects, including antiques or other collectables
- the market or trade value of all savings and investments, including funeral bonds
- loans you have made to other people, family trusts and companies
- value of most income stream products
- business assets
- interest in a private trust or private company
- superannuation investments held by people over Age Pension age
- licences (for example, fishing or taxi)
- surrender value of life insurance policies
- any assets given away or sold for less than their market value within the last 5 years.

The following assets are exempt assets and are not included:

- your principal family home (and up to 2 hectares of privately used surrounding land that is on the same title document as the home) and any permanent fixtures, such as wall-to-wall carpet and wall heaters
- some income stream products
- cemetery plots and pre-paid funeral expenses
- any property or monies left to you in an estate, which you are not yet able to receive, generally for a period up to 12 months
- accommodation bonds paid to an aged care home or on entry to residential aged care
- aids for people with a disability
- monies received from the National Disability Insurance Scheme to provide for the needs of people with a disability
- most compensation or insurance payments for loss or damage to buildings or personal effects
- any life interest, reversionary interest, remainder interest or contingent interest, unless it was created by you, your partner or at the time of death of your partner
- assets up to a certain limit held in a Special Disability Trust for an immediate family member.

For more information about assets, go to **servicesaustralia.gov.au/assets**

Remove this Notes booklet from the form if you have not already done so.

Changes you should tell us about

You should tell us if:

- you marry, are in or start a registered or de facto relationship, reconcile with a former partner, start living with someone as their partner
- you separate from your partner
- your partner dies
- your (or your partner's) financial circumstances change
- a dependent child or student either enters or leaves your care
- the status of your family home changes, for example, you sell your home
- you enter residential aged care.

Changes such as these may affect the amount of pension you receive or the contributions you may be asked to pay for Support at Home services.

To advise us of changes, call us on **1800 227 475** or DVA on **133 254**.

Person signing on your behalf

This form must be signed by the person the application is for or someone who is authorised to sign on their behalf. An authorised person may be an enduring power of attorney, power of attorney (financial), or a person/organisation holding an administrative or financial order. You **must** provide photo identification for **all** signing guardians and attorneys.

A person can apply for an assessment for the cost of care on behalf of someone else if:

- they are already acting as the person's nominee
- they hold a power of attorney or guardianship order
- a letter from a doctor, nurse or similar health professional is provided stating that the customer is unable to sign the application form
- the application is made by the Director of Nursing at the aged care home where the customer is a resident.

Where the person is deceased only the executor of the will or a person holding letters of administration is authorised to sign on behalf of their estate.

Identity requirements

Power of attorney or authorised person

The **power of attorney** or **authorised person** of the customer will need to provide photo identification in person at one of our service centres, agents or access points to have their identity verified. For example, a current Australian driver licence or valid passport can be provided – for a full list, go to **servicessaustralia.gov.au/identity**

Authorised organisation staff

Staff from your authorised organisation will need to verify their identity details when they create their Provider Digital Access (PRODA) account to access nominee online services. For more information, go to **servicessaustralia.gov.au/proda**

Authorising a person or organisation to enquire or act on your behalf

You can authorise a person or organisation to enquire or act on your behalf for aged care purposes. You will need to complete the **Authorising a person or organisation to enquire or act on your behalf (SS313)** form at the back of this form and return it separately. If you want more information about nominee arrangements, go to **servicessaustralia.gov.au/actforyou** or call us on **1800 227 475**.

If you are receiving a DVA means tested payment (see **Notes** page 2), complete the **Aged care request for a nominee for Department of Veterans' Affairs customers (AC019)** form by going to **servicessaustralia.gov.au/forms**

For information about the DVA authorised person arrangements, call DVA on 1800 VETERAN (**1800 838 372**).

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Support at Home calculation of your cost of care (SA456)

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.

1 Why do you want an assessment?

Tick one only

Option 1:

Starting to receive
Support at Home
services

- ☐ Answer the questions in this form based on your current situation. We will use the date you submit the form as the application date.

► **Go to next question**

Option 2:

I am currently
receiving or
have previously
received in-home
care through
Support at Home
or a Home Care
Package

- ☐ Answer the questions in this form based on your situation at the date you started to receive in-home care through Support at Home or a Home Care Package.

In-home care services start date
(DD MM YYYY)

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► **Go to next question**

Option 3:

For residential
aged care

- ☐  Do not complete this form. See 'When to use this form' on page 1 of the **Notes**.

2 Do you receive a means tested income support payment from Centrelink or DVA?

For a list of means tested payments, refer to 'Centrelink or Department of Veterans' Affairs payments' section on page 2 of the **Notes**.

No ☐ ► **Go to next question**

Yes ☐  Do not complete this form. See 'When to use this form' on page 1 of the **Notes**.

3 Are you completing this form on behalf of someone else?

For example, partner, parent or relative.

No ☐ ► **Go to next question**

Yes ☐ ► Give details below

Your full name

Your relationship to the person the assessment is for

If you wish to be listed as a nominee for aged care purposes, you and/or the person this assessment is for will need to complete the nominee section at the back of this form. We may contact nominees about this assessment.

4 Do you (the person who the assessment is for) have a partner?

For this assessment, a partner can be either:

- a person you are legally married to, or who you were living with in a de facto relationship, but are now living apart on a permanent basis due to a **health related reason**, for example, if the person entered residential aged care
- a person you are legally married to and normally live with on a permanent basis
- a person who lives with you in a de facto relationship, although you are not legally married to that person
- a person in a registered relationship.

No ☐ ► **Go to next question**

Yes ☐ ► We will ask basic information about your partner.

If your partner would like an assessment, they need to complete a separate SA456 assessment form.

► **Go to next question**



CLK0SA456 2511

Qualifying service

14 Read this before answering the following question.

Qualifying service is service in a war or war like operations where you incurred danger from hostile forces of the enemy.

If you (and/or your partner) have qualifying service, any Department of Veterans' Affairs Adjusted Disability Pension you receive will be exempt from the aged care income assessment.

You

Do you have qualifying service?

No ☐

Yes ☐

Your partner

Does your partner have qualifying service?

No ☐

Yes ☐

Your assessment

15 Do you want to provide your and your partner's (if applicable) income and assets so we can calculate your cost of care?

No ☐ You will pay the maximum contributions for the Support at Home services you receive until you reach the lifetime cap.

► **Go to 57**

Yes ☐ You are giving us permission to collect and use your and your partner's (if applicable) personal information and to disclose it to the:

- Department of Social Services for social security purposes, including to update information about your income and assets
- Department of Veterans' Affairs for purposes including determining responsibility for calculation and payment of subsidies under the *Aged Care Act 2024*, and
- Department of Health, Disability and Ageing for purposes including reporting, developing aged care policy and investigating aged care contributions and payment issues.

► **Go to next question**

Dependent children

16 Read this before answering the following question.

For aged care purposes, to be a dependent child the young person must be:

- younger than 16 years, or
- 16 to 24 years and receiving full-time education at a school, college or university, **and** not in full-time employment or receiving a Centrelink income support payment.

You must be legally responsible (whether alone or jointly with another person) for their day-to-day care, welfare and development, or under a legal obligation to provide financial support to them.

Did you (and/or your partner) have any dependent children/students in your care when you started receiving in-home care?

No ☐ ► **Go to 17**

Yes ☐ ► How many?

Your home

- 17** Did you (and/or your partner) receive **rental income** from your family home at the start/application date?

No ☐ ► *Go to next question*

Yes ☐ ►



Provide documents showing details of the rental income and the costs for the property.

► *Go to next question*

- 18** Did you (and/or your partner) own or partly own your home at the start/application date?

Answer 'Yes' to this question for situations including, but not limited to:

- you were paying off a mortgage on your home
- your home was in a retirement village and you had paid an entry contribution
- your home was owned by a private/family trust or a private company that was controlled by you (and/or your partner), or
- you have an agreement with somebody else who owns part of the home (business/family partnership).

No ☐ ► *Go to next question*

Yes ☐ ► *Go to 20*

- 19** 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

\$

Expected date of purchase or completion of your new family home

(DD MM YYYY)

- 20** Is your home used for a business purpose, has more than one property title or larger than 5 acres (2 hectares)?

No ☐ ► *Go to 27*

Yes ☐ ► *Go to next question*

- 21** Select the **option** that applies to you and answer the questions based on the start/application date:

Option 1: Small property, suburban block or apartment/unit

My home is on land up to and including 5 acres (2 hectares) ☐ Give details below

Does the property have more than 1 title?

No ☐ ► *Go to 22*

Yes ☐ ► Give details below

What is the estimate of the current market value of the property, including land, buildings and water assets (for example, water rights allocations or licences)?

\$

Estimate the market value of the home and surrounding title

\$

Estimate the market value of the remaining title(s)

\$

Balance of loan(s) for your property

\$

Who owns your home as shown on the property title?

Your share

%

Your partner's share

%

Other's share

%



Provide a copy of the water rights, allocation or licence documents, if applicable.

Continue

Option 2: Large property or large suburban block

My home is on land over
5 acres (2 hectares)

☐ Give details below

What is the estimate of the current market value of the property, including land, buildings and water assets (for example, water rights allocations or licences)?

\$

Estimate the market value of the first 5 acres of your property including buildings

\$

Estimate the market value of the remaining acreage

\$

Balance of loan(s) for your property

\$

Who owns your home as shown on the property title?

Your share %

Your partner's share %

Other's share %



Provide a copy of the water rights, allocation or licence documents, if applicable.

- 22** What is the legal description of the property (for example, lot, section, parish)?

This information can be found on a rates notice.

If the property is made up of more than one title, provide details for each separate title.



Provide a copy of the council rates notice.

- 23** Are you (and/or your partner) using any rooms or buildings in your home property solely for business purposes?

This includes rooms used for a bed and breakfast or a room/office used solely for running a business.

No ☐ Go to next question

Yes ☐ Value of the rooms or buildings of your home property used only for business

\$

- 24** Is any portion of the land surrounding your home property used primarily for business purposes?

This includes using the land for cultivation, orchards, grazing animals or for other reasons such as camping sites.

No ☐ Go to next question

Yes ☐ Estimated value of the portion of the land (up to 2 hectares or 5 acres) surrounding your home property that you own and that is used primarily for business purposes

\$

- 25** Was the property mortgaged or encumbered at the start/application date?

No ☐ Go to next question

Yes ☐



Provide the:

- mortgage or loan agreement(s) showing which assets or properties are held as security against the loan (if applicable)
- statement of each loan account.

- 26** Are there any circumstances affecting the value of the property?

This may include details such as:

- no water on property for grazing livestock
- lack of adequate fencing
- hills
- rocky ground
- natural bushland
- unusual title.

No ☐ Go to next question

Yes ☐ Give details below

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

Your other property details

- 27** Other than your family home, did you (and/or your partner) own other properties in or outside of Australia at the start/application date?

No ☐ **Go to 39**

Yes ☐ **Go to next question**

- 28** How many properties in Australia and/or outside Australia do you (and/or your partner) own, partly own or have an interest in at the start/application date?

 If you own/owned more than one investment property, at the start/application date, you will need to copy and provide the pages with questions **29** to **38** and answer for each property.

- 29** Address of the property

Postcode

Country (if not in Australia)

- 30** What is the legal description of the property, for example, lot, section, parish?

This information can be found on a rates notice.
If the property is made up of more than one title, provide details for each separate title.

 Provide a copy of the latest council rates notice.

- 31** Who owns/owned your other property as shown on the property title at the start/application date?

You ☐ Percentage owned %

Your partner ☐ Percentage owned %

Other ☐ Give details below

Name of person/entity

Percentage owned

 %

 Provide a copy of each title deed if you answered 'Other'.

- 32** Did you (and/or your partner) receive **rental income** from your other property at the start/application date?

Include rental income from properties both in and/or outside Australia.

No ☐ **Go to next question**

Yes ☐

 Provide documents showing details of the rental income and the costs for each property.

► **Go to next question**

- 33** What type of property is this?

Vacant land ☐

House on land larger than 2 hectares (5 acres) ☐

Townhouse ☐

Self contained flat (part of or attached to a house) ☐

Units/flats ☐

Retail premises ☐

Commercial premises ☐

Industrial premises ☐

Farm/primary producer property ☐

Market garden ☐

Hobby farm ☐

Bush block ☐

House ☐

Other, ☐ Give details below
for example, granny flat

34 What is your estimate of the current market value of the property, including land, buildings and water assets (for example, water rights, allocations or licences)?

If your other property is counted as an asset, you do not need to have it professionally valued. If required, we will verify the estimated value of the property at no cost to you.

\$



Provide a copy of the water rights, allocation or licence documents, if applicable.

Are there any circumstances affecting the value of the property?

This may include details such as:

- no water on property for grazing livestock
- lack of adequate fencing
- hills
- rocky ground
- natural bushland
- unusual title.

No ☐ Go to next question

Yes ☐ Give details below

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

35 What type of buildings are on the other property?

This information will assist us to value the property.

1 What is the approximate floor area in square metres?

How old is the building?

Type of construction

Exterior (for example, brick, timber)

Interior (for example, plaster, not lined)

Roof (for example, iron, tiled)

General condition (for example, fair, good, poor)

Total number of flats/units in complex (if applicable)

For residential building, number of bedrooms

Number of other rooms (excluding laundry, bathroom, toilet)

If you (and/or your partner) have more than 1 building on this property, provide a separate sheet with details.

36 What is the area or dimension of the other property?

Complete **one** of these measurements only.

Area in hectares

or

Area in acres

or

Area in square metres

or

Dimensions

X

If your property is made up of more than one title, provide a separate sheet with details of the area or dimensions for each title.

37 Was the property mortgaged or encumbered at the start/application date?

No ☐ Go to next question

Yes ☐



Provide the:

- mortgage or loan agreement(s) showing which assets or properties are held as security against the loan (if applicable)
- statement of each loan account.

38 What is your estimate of the **current market value of the household contents** you (and/or your partner) own in the other property, at the start/application date?

Only answer this question if this property is **not** your home property.

The **current market value** of the household contents is what you would get if you sold it. It is not the replacement or insured value.

If you do not provide an estimate, we will use a default amount of \$10,000.

Include:

- all furniture (including soft furnishings such as curtains), antiques and works of art
- electrical appliances such as televisions and fridges.

Do not include:

- fixtures such as stoves and built-in items.

Current market value

\$

Assets and income

39 Give details below of all accounts held by you (and/or your partner) in banks, building societies or credit unions, at the start/application date.

Include:

- savings accounts
- cheque accounts
- term deposits
- accounts you hold in trust or under any other name
- money held in church or charitable development funds, or
- money located in travel money cards or travellers cheques.

Accounts and term deposits outside Australia should be included, with the current balance in the type of currency in which it is invested. We will convert this into Australian dollars (AUD).

Do not include:

- superannuation
- shares
- managed investments, or
- an account used exclusively for funding from the National Disability Insurance Scheme (NDIS).



Provide evidence from your financial institution that shows your current account balance, account number and account holder name(s) for each account held.

Copies can be provided.

ATM slips are not acceptable.

1 Name of bank, building society or credit union

Account number (this may not be your card number)

Type of account

Balance of account

Currency if not AUD

Your share %

Partner's share %

Continue

2 Name of bank, building society or credit union

Account number (this may not be your card number)

Type of account

Balance of account Currency if not AUD

Your share % Partner's share %

3 Name of bank, building society or credit union

Account number (this may not be your card number)

Type of account

Balance of account Currency if not AUD

Your share % Partner's share %

4 Name of bank, building society or credit union

Account number (this may not be your card number)

Type of account

Balance of account Currency if not AUD

Your share % Partner's share %

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

40 Did you (and/or your partner) have any **money invested in superannuation or income stream products** at the start/application date?

Superannuation includes:

- approved deposit funds
- deferred annuities
- retirement savings accounts
- Self Managed Superannuation Funds (SMSF) and Small APRA Funds (SAF) if the funds are complying.

An **income stream product** is a regular series of payments which may be made for a lifetime or a fixed period by:

- a financial institution
- a superannuation fund
- a Self Managed Superannuation Fund (SMSF)
- a Small APRA Fund (SAF)
- an employer subject to Australian prudential regulations.

Types of income streams include:

- Allocated Pension (also known as Account Based Pension)
- Market-Linked Pension (also known as Term Allocated Pension)
- Annuities
- Defined Benefit Pension (for example, ComSuper pension, State Super pension and Australian Defence Force superannuation payments)
- Superannuation Pension (non-defined benefit).

No ☐ ➤ Go to next question

Yes ☐ ➤ Give details below and on the next page



For each account-based income stream, you (and/or your partner) will need to provide:

- a Services Australia/DVA schedule or similar schedule, or
- a **Details of income stream product (SA330)** form.

If you do not have this form, go to **servicessaustralia.gov.au/forms**

The schedule or form must be completed by your:

- product provider
- the trustee of the Self Managed Superannuation Funds (SMSF) or Small APRA Funds (SAF), or
- SMSF administrator.

Provide a copy of the latest statements for superannuation funds and retirement savings accounts. Statements must include a breakdown of your superannuation investment portfolio.

If you have a SMSF or SAF, provide the financial statement including income tax return and member statement.

Do not include printouts of online balances.

Continued

1 Name of institution/fund manager			
Name of fund			
Account balance (if applicable)	Amount that can be withdrawn as a lump sum (if applicable)		
\$	\$		
Amount of income received (if any)	How often (for example, monthly)		
\$	per		
Date of purchase (DD MM YYYY)	Your share	Partner's share	
	%	%	

2 Name of institution/fund manager			
Name of fund			
Account balance (if applicable)	Amount that can be withdrawn as a lump sum (if applicable)		
\$	\$		
Amount of income received (if any)	How often (for example, monthly)		
\$	per		
Date of purchase (DD MM YYYY)	Your share	Partner's share	
	%	%	

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

41 Did you (and/or your partner) have any **managed investments** in and/or outside Australia at the start/application date?

Include:

- investment trusts
- personal investment plans
- life insurance bonds
- managed fund
- friendly society bonds.

Do not include:

- conventional life insurance policies (policies that can be cashed in)
- funeral bonds
- superannuation or rollover investments
- investments purchased with a margin loan.

Asia Pacific Investment Register (APIR) code – is commonly used by fund managers to identify individual financial products.

No ☐ Go to next question

Yes ☐ Give details below

 Provide a copy of the document which gives details for each investment (for example, certificate with number of units or account balance).

1 Name of company			
Name of product (for example, investment trust)		Type of product/option (for example, balanced, growth)	
Number of units	APIR code (if known)		
Current market value	Currency if not AUD		
\$			
Your share	%	Partner's share	%

2 Name of company			
Name of product (for example, investment trust)		Type of product/option (for example, balanced, growth)	
Number of units	APIR code (if known)		
Current market value	Currency if not AUD		
\$			
Your share	%	Partner's share	%

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

- 42** At the start/application date did you (and/or your partner) own any **shares**, or other **securities listed** on a stock/securities exchange in and/or outside Australia, or in public companies **not listed** on a stock exchange?

Include:

- futures
- options
- derivatives
- rights
- shares
- preference shares
- convertible notes.

Do not include:

- managed investments
- self managed superannuation funds.

No ☐ Go to next question

Yes ☐ Give details below

 Provide the latest statement for each share holding.

1 Name of the public company

Australian Securities
Exchange (ASX) code
(if you have one)

Number of shares held

Country if not Australia

Your share

Partner's
share

 %

 %

2 Name of the public company

ASX code (if you have one)

Number of shares held

Country if not Australia

Your share

Partner's
share

 %

 %

3 Name of the public company

ASX code (if you have one)

Number of shares held

Country if not Australia

Your share

Partner's
share

 %

 %

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

- 43** Did you (and/or your partner) have any **bonds or debentures** at the start/application date?

Bonds refer to government and semi-government bonds.

Include:

- investments in and/or outside Australia
- bonds or debentures outside Australia should be included, with the current balance in the type of currency in which it is invested. We will convert this into Australian dollars.

Do not include:

- friendly society bonds, funeral bonds or life insurance bonds/investments
- aged care accommodation bonds, aged care refundable accommodation deposits, or aged care refundable accommodation contributions.

No ☐ Go to next question

Yes ☐ Give details below

 Provide a document which gives details for each bond or debenture.

1 Name of company

Type of investment

Current amount invested

Currency if not AUD

Your share

%

Partner's
share

%

2 Name of company

Type of investment

Current amount invested

Currency if not AUD

Your share

%

Partner's
share

%

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

44 Did you (and/or your partner) have any **funeral bonds**, **funeral investments** or have a contract to have funeral services provided for which an agreed sum has already been paid to the provider at the start/application date?

No ☐ Go to next question

Yes ☐ Give details below

 Provide documentation showing details of the funeral bonds, funeral investments or a copy of each contract.

1 Name of company

Name of product

APIR code (if known)

Purchase price including instalments but not interest

\$

Current value as per latest statement

\$

Your share

%

Partner's share

%

2 Name of company

Name of product

APIR code (if known)

Purchase price including instalments but not interest

\$

Current value as per latest statement

\$

Your share

%

Partner's share

%

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

45 Did you (and/or your partner) have any **life insurance** policies that could be cashed in at the start/application date?

No ☐ Go to next question

Yes ☐ Give details below

 Provide a copy of the latest statement for each policy.

1 Name of product

Policy number

Number of units

Your share

%

Partner's share

%

2 Name of product

Policy number

Number of units

Your share

%

Partner's share

%

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

46 At the start/application date, did you (and/or your partner) have **money on loan** to another person or organisation?

Include all loans, whether they are made to family members, other people or organisations or trusts.

Do not include loans to secure accommodation in retirement villages or aged care.

No ☐ Go to next question

Yes ☐ Give details below



Provide a document which gives details for each loan (if available).

If the money was loaned to a private trust you will need to complete and return the **Private Trust (Mod PT)** form.

If you do not have this form, go to servicesaustralia.gov.au/forms

1 Who did you lend the money to?

Date lent (DD MM YYYY)

Amount lent

Current balance of loan

Lent by you %

Lent by your partner %

2 Who did you lend the money to?

Date lent (DD MM YYYY)

Amount lent

Current balance of loan

Lent by you %

Lent by your partner %

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

47 In the 5 years **before** your start/application date, have you (and/or your partner) **given away**, or sold for less than their market value, or surrendered a right to any cash, assets, property or income?

Gifting is where you:

- give away assets, or
- transfer them for less than their market value.

For example, if you or your partner:

- give away/transfer shares in a private company
- transfer your shares or units in a trust or company and do not get full market value for them
- give up control of a trust or company – this is a gift of all the assets the trust or company holds
- own a property and sell it for less than it is worth
- buy a car as a present
- have 10% of your wages donated to your church
- forgive a loan
- have to repay a business loan because you guaranteed it
- put money into a family trust and neither you nor your partner control the trust.

It is not gifting if you:

- own a house valued at an amount, but sold it on the open market with the best offer to date, as you could not wait for a higher offer
- have a debt that you cannot repay, so you transfer a car worth about the same to wipe out the debt
- put money into a family trust that you or your partner control.

For more information, refer to page 3 of the **Notes**.

No ☐ Go to next question

Yes ☐ Give details below

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

What it was worth

What you got for it

Date given or sold (DD MM YYYY)

Your share Partner's share

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

No ☐ Yes ☐

Continued

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

What it was worth What you got for it

\$ \$

Date given or sold (DD MM YYYY) Your share Partner's share

 % %

Was this gift to a Special Disability Trust (SDT)? No ☐ Yes ☐

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

48 Did you (and/or your partner) **receive payments from outside Australia** at the start/application date?

Include pensions from other countries, benefits, allowances, superannuation, compensation and war related payments in the type of currency in which it is paid. We will convert this into Australian dollars.

You must include details of pensions, allowances and other payments even if they are not taxable in the country of payment.

No ☐ Go to next question

Yes ☐ Give details below

 Provide a document from the issuing authority or agency which gives details including the amount in the foreign currency (for example, latest pension certificate) for each payment.

1 Type of payment

Country which pays it?

Amount paid (before tax or deductions) Currency if not AUD

Paid to: You ☐ Your partner ☐

Continued

2 Type of payment

Country which pays it?

Amount paid (before tax or deductions) Currency if not AUD

Paid to: You ☐ Your partner ☐

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

49 Did you (and/or your partner) have an interest in a business at the start/application date?

Include:

- self-employed
- sole trader
- partnership
- sub-contractor.

No ☐ Go to next question

Yes ☐



You will need to provide:

- your (and/or your partner's) latest personal income tax return(s)
- business income tax return for the last financial year
- a profit and loss statement, depreciation schedule and any other explanatory notes which form part of the accounts of the business or company.

50 Have you (and/or your partner) **had an interest** in a **private trust** in any of the ways detailed below, in the 5 years up to the start/application date?

You are considered to have an interest in a private trust if **any** of the following apply.

You (and/or your partner) are:

- the appointor
- guardian or principal of the trust
- a trustee

or

- are a shareholder or director of the trustee company
- are a beneficiary or included amongst the categories of beneficiaries of the trust
- are a unit holder
- are owed money by the trust
- are able to benefit from the trust
- can expect the trustee or appointor of a trust to act in accordance with your wishes.

No ☐ **Go to 52**

Yes ☐

 If you (and/or your partner) have not previously advised us of this trust, complete and return a **Private Trust (Mod PT)** form.
If you do not have this form, go to **servicesaustralia.gov.au/forms**
▶ **Go to next question**

51 Is the private trust a **Special Disability Trust (SDT)**?

No ☐ **Go to next question**

Yes ☐ **Go to next question**

52 Have you (or your partner) **had an interest** in a **private company** in any of the ways detailed below, in the 5 years up to the start/application date?

You are considered to have an interest in a private company if **any** of the following apply.

You (and/or your partner):

- are a shareholder of the private company
- are a director or other office holder of the company
- are owed money by the company
- are able to benefit from the company
- can expect the director of a company to act in accordance with your wishes
- can expect the governing director or majority shareholder to act in accordance with your wishes.

No ☐ **Go to next question**

Yes ☐ Was your involvement only as a director and you (and/or your partner) have no shares in or loans to the company?

No ☐

 You will need to complete and return the **Private Company (Mod PC)** form.
If you do not have this form, go to **servicesaustralia.gov.au/forms**
▶ **Go to next question**

Yes ☐ **Go to next question**

53 At the start/application date did you (and/or your partner) receive any **other income** that you have not already listed on this form?

Include income or money from:

- income from boarders and lodgers
- income protection insurance
- life interests
- other Australian government departments
- other income (for example, royalties)
- other payments from outside Australia
- regular compensation payments or damages
- work (including holiday pay, long service leave, sick pay)
- gratuities (tips).

Do not include for you (and/or your partner and/or your child(ren)) funding from the National Disability Insurance Scheme (NDIS).

No ☐ **Go to next question**

Yes ☐ **Give details below**

 Provide a copy of documentation giving details of the type and the amount of the payment.

1 Type of income

Gross amount received

\$ per

Currency if not AUD	Your share	Partner's share
	%	%

2 Type of income

Gross amount received

\$ per

Currency if not AUD	Your share	Partner's share
	%	%

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

54 What is your estimate of the **current market value** of your (and/or your partner's) **household contents** and **personal effects** at the start/application date?

The **current market value** is the price that you would expect to get **if you sold the item**. It is not the replacement or insured value.

If you do not provide an estimate we will use a default amount of \$10,000.

Include:

- all furniture (including soft furnishings such as curtains), antiques and works of art
- electrical appliances such as televisions and fridges
- jewellery for personal use.

Do not include:

- fixtures such as stoves and built-in items.

An estimate of the current market value

\$

55 Did you (and/or your partner) own, partly own or have a financial interest in any **motor vehicles, boats, caravans or trailers** at the start/application date?

No ☐ **Go to next question**

Yes ☐ **Give details below**

 Provide a copy of a statement showing the amount owing for each loan, if applicable.

1 Type of asset (for example, car)	Make (for example, Ford)
Model (for example, Focus)	Year
Current market value	Balance of loan(s)
\$	\$
Your share %	Partner's share %

2 Type of asset (for example, car)	Make (for example, Holden)
Model (for example, Astra)	Year
Current market value	Balance of loan(s)
\$	\$
Your share %	Partner's share %

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

56 Did you (and/or your partner) have any **other assets** (in or outside Australia) that you have not already told us about on this form at the start/application date?

Include:

- taxi plates
- time share
- racehorses
- travellers cheques
- crypto currency (for example, bitcoin)
- collectables (for example, stamps, coins, wine, art, antiques)
- commercial licences (for example, fishing, hunting)
- water assets including rights, allocations or licences not associated with land owned by you (and/or your partner).

Do not include an account used exclusively for funding from the National Disability Insurance Scheme (NDIS).

Questions continue next page ►

No ☐ ► Go to next question

Yes ☐ ► Give details below



Provide supporting documentation.

1 Description of asset

Current market value

Amount owed

Currency if not AUD

Your share

Partner's
share

%

%

2 Description of asset

Current market value

Amount owed

Currency if not AUD

Your share

Partner's
share

%

%

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

Privacy notice

57 You need to read this

Privacy and your personal information

The privacy and security of your (and/or your partner's) personal information is important to us and is protected by law. We collect your personal information to calculate your cost of care and to undertake assessments to determine:

- the contributions payable by care recipients
- government subsidies payable to registered providers.

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/privacypolicy

Declaration for the person the assessment is for

58 Read this before continuing.

If you (the person the assessment is for) are not able to sign this declaration, it should be signed by someone who is authorised to sign on your behalf. The authorised person must also sign question 59. See 'Person signing on your behalf' section on page 5 of the **Notes**.

I consent to:

- the Department of Health, Disability and Ageing providing Services Australia and the Department of Veterans' Affairs with information about periods, types and levels of care, and assessments for my current and/or previous care, if required to complete my assessment.

I declare that:

- my partner (if applicable) is aware/notified that their personal and financial information will be collected by Services Australia and the Department of Veterans' Affairs for the purpose of calculating contributions and subsidies under the *Aged Care Act 2024*
- the information I have provided in this form is complete and correct.

I understand that:

- giving false or misleading information is a serious offence.

Signature of the person the assessment is for (or the person signing on their behalf)



Date (DD MM YYYY)

► If someone is signing on behalf of the person the assessment is for, question 59 **must** also be completed and signed.

59

If someone signs on your behalf

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Mx ☐ Other

Family name

First given name

Second given name

Address

Postcode

Phone number (including area code)

Relationship to the person who the assessment is for

Make sure you have read **Privacy and your personal information** on this page.

You **must** provide photo identification for **all** signing guardians and attorneys.

Signature of legal guardian, power of attorney or existing nominee



Date (DD MM YYYY)

When 2 or more people have joint power of attorney, all people with joint power of attorney need to sign. If more than 2 signatures are required, provide a separate sheet with details.

Signature of the second legal guardian, power of attorney or existing nominee



Date (DD MM YYYY)



Which of the following documents are you providing with this form?

A copy of the power of attorney order ☐

A copy of the administration order ☐

A copy of the financial management order ☐

A letter from a medical professional ☐

A copy of the guardian(s) and/or attorney(s) photo identification ☐

Not applicable – existing nominee arrangement ☐

Questions continue next page ►

Checklist

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

You must provide **copies** of the documents. The copies will not be returned.

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

Tick all that apply

Documents showing details of the rental income (if you answered Yes at question 17 or 32)	☐
Documents to verify the details of the sale of your former home (if you answered Yes at question 19)	☐
Water rights, allocation or licence documents (if you answered Yes at question 21 or answered question 34)	☐
Latest council rates notice (if you answered question 22 or 30)	☐
Statement showing the amount owing for each mortgage (if you answered Yes at question 25 or 37)	☐
Details of each investment property (if you answered question 28)	☐
Title deed(s) of each property (if you answered Other at question 31)	☐
Documents showing your current account balance, account number and account holder name(s) (required at question 39)	☐
A Services Australia/DVA schedule or similar schedule or a Details of income stream product (SA330) (if you answered Yes at question 40)	☐
Latest statements or schedules for each fund, including latest council rates notices for any real estate held by SMSF and SAF (if you answered Yes at question 40)	☐
Managed investment certificate or similar document (if you answered Yes at question 41)	☐

Continued

Share certificates or latest statement for each shareholding listed on a stock exchange (if you answered Yes at question 42)	☐
Investment bond/debenture documents (if you answered Yes at question 43)	☐
Details of the funeral bond(s) or funeral investment(s) (if you answered Yes at question 44)	☐
Latest statement for each life insurance policy (if you answered Yes at question 45)	☐
Money on loan documents (if available) and Private Trust (Mod PT) form (if required) (if you answered Yes at question 46)	☐
Documents with details of payments by authorities or agencies outside Australia (if you answered Yes at question 48)	☐
Latest personal income tax return(s), business income tax return, a profit and loss statement, depreciation schedule and any other explanatory notes of the business or company (if you answered Yes at question 49)	☐
Private Trust (Mod PT) form (if you required at question 50)	☐
Private Company (Mod PC) form (if you answered Yes then No at question 52)	☐
Documents with details on any other income (if you answered Yes at question 53)	☐
Statement showing amount owing for each loan (if you answered Yes at question 55)	☐
Documents with details on any other assets (if you answered Yes at question 56)	☐
Documents related to signing on behalf of the person the assessment is for (if signed at question 59)	☐

Returning this form

Return this form and any supporting documents to:

- **Services Australia**

if you receive an income support payment from Services Australia, return to:

Services Australia
Residential Care
PO Box 7821
Canberra BC ACT 2610

- **Department of Veterans' Affairs**

if you receive an income support payment from the Department of Veterans' Affairs, return to:

Department of Veterans' Affairs
GPO Box 9998
Brisbane QLD 4001

You should do this **before** your Support at Home services commence (if possible) to make sure your cost of care can be calculated as quickly as possible. If you start receiving Support at Home services without having an assessment, you could be asked to pay the maximum contributions applicable.

If you are authorising a person or organisation to enquire or act on your behalf, complete and return the form on the following pages separately.



If you are receiving a Department of Veterans' Affairs (DVA) means tested payment (see **Notes** page 2) you should complete and return the **Aged care request for a nominee for Department of Veterans' Affairs customers (AC019)** form. If you do not have this form, go to servicesaustralia.gov.au/forms

This page has been left blank intentionally.

Authorising a person or organisation to enquire or act on your behalf



When to use this form

You can use this form to authorise a person or organisation to enquire or act on your behalf for Centrelink payments and services including aged care.



If you or your nominee have your Centrelink payments income managed, call **1800 132 594** before filling in this form.



Protecting you and your information

If you are affected by family and domestic violence, there is help available. Call **132 850** Monday to Friday, 8am to 5pm local time, and ask to speak to a social worker. Otherwise, you can contact 1800RESPECT (**1800 737 732**), a 24 hour service. If you are in immediate danger, call **000**. For more information, go to **servicesaustralia.gov.au/domesticviolence**

If you think the arrangement you have given a person or organisation is being misused, you can call us on your regular payment line, or call **132 850** Monday to Friday from 8 am to 5 pm, or visit one of our service centres.



For more information

For Child Support, Medicare or more information, go to **servicesaustralia.gov.au/authorisedrepresentative**

If you need to call us, use your regular payment line.

To speak to us in your language, call **131 202**. Call charges may apply.

We can translate documents you need to give us for free.

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.

Type of arrangement you can request

The **information below** may help you choose the type of arrangement that best suits your needs and will assist you to answer question 5. There are 4 types of arrangements that can be requested.

If you want to have a different correspondence nominee to your payment nominee, person permitted to enquire or person permitted to update, you will need to complete a separate form.

Your authorised person or organisations can:	Person permitted		Correspondence nominee	Payment nominee
	 to enquire	 to update		
Ask us questions about your payments or services	✓	✓	✓	✓
Tell us about changes to your circumstances	✗	✓	✓	✗
Respond to requests for information	✗	✓	✓	✗
Come to appointments with you or, if appropriate, on your behalf	✗	✗	✓	✗
Complete and sign forms and statements	✗	✗	✓	✗
Get copies of your letters	✗	✗	✓	✗
Get your Centrelink payments, and use them only for your benefit	✗	✗	✗	✓
View and update your information online	✗	✗	✓	✓
Claim payments and services for you	✗	✗	✓	✗

Identity requirements

Power of Attorney or authorised person

The **Power of Attorney** or **authorised person** of the customer will need to provide photo identification in person at one of our service centres, agents or access points to have their identity verified. For example, a current Australian driver licence or valid passport can be provided – for a full list, go to **servicesaustralia.gov.au/identity**

Authorised organisation staff

Staff from your authorised organisation will need to verify their identity details when they create their Provider Digital Access (PRODA) account to access nominee online services. For more information, go to **servicesaustralia.gov.au/proda**

Important information – type of arrangement

When choosing your type of arrangement, you should consider the following:

- you can only have **one** correspondence and **one** payment nominee. These can be different people. You will need to complete a separate form for each
- a person or organisation who is **both a correspondence and payment nominee** can enquire, act and get your Centrelink payments and aged care fee assessment on your behalf
- the person you are authorising cannot have a nominee acting on their behalf
- you can still deal with us, even if you have authorised a person or organisation to assist you
- if you get more money from us than you are entitled to, you will need to repay this. Your nominee is not responsible for repaying this money
- if you have a nominee of the same type already in place, this request will automatically cancel the existing arrangement. Your existing nominee will get a letter telling them of the cancellation.

Person permitted to enquire or update – responsibilities and obligations



A person permitted to enquire or update:

- is required to use the information we give them to assist you to better understand your payment and services.



A person permitted to update:

- can provide us with information to update your payment and services
- must act in your best interest.

A person permitted to enquire or update cannot:

- make decisions for you
- sign forms or statements
- get copies of your letters.

You can authorise more than one person or organisation to be your person permitted to enquire or update.

Correspondence and payment nominee – responsibilities and obligations



A correspondence nominee is required to:

- let us know of any changes to your circumstances **within 14 days (within 28 days if they are outside Australia)**
- respond to notices, including providing requested information and reporting notifiable events. If they do not respond to a notice, it will mean that you (as the customer), did not meet your obligations. If applicable, your payments may be stopped
- act in your best interest
- let us know of any changes that may affect their ability to be your nominee.



A payment nominee is required to:

- use your Centrelink payments for your benefit
- keep records on how the money was spent. We can review these records at any time. If the payment nominee does not provide this information, financial penalties may be imposed on them
- act in your best interest
- let us know of any changes that may affect their ability to be your nominee.

Aged care calculation of your cost of care

Your **person permitted to enquire** can ask questions only, and your **person permitted to update** can ask questions and make updates to your income and assets.

If you are accessing aged care services, your **correspondence nominee** will be able to:

- complete and sign forms for calculation of your aged care cost of care
- ask questions about your aged care cost of care
- update your income and assets
- get copies of your aged care cost of care letters.

Authorising a person or organisation to enquire or act on your behalf (SS313)

How to complete this form

You can fill this form digitally in some browsers, or you can open it in Adobe Acrobat Reader. If you do not have Adobe Acrobat Reader, you can print this form and complete it.

Part A and Part C – collects the customer's details (the person requesting an authorised person or organisation) (pages 1 and 3).

Part B and Part D – collects the authorised person or organisation details (pages 2 and 4).

If you have a printed form:

- Print in BLOCK LETTERS using black or blue pen.
- Where you see a box like this ☐ **GO** skip to the question number shown.

Privacy notice

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 to provide payments and services. 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/privacypolicy

Part A – Customer details (the person requesting an authorised person or organisation)

1 Your Centrelink Customer Reference Number (if known)

--	--	--	--

2 Your name

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Mx ☐ Other

Family name

First given name

Second given name(s)

3 Your date of birth (DD MM YYYY)

--	--	--	--	--	--

4 Your permanent home address

Postcode

Your postal address (if different from above)

Postcode

Has your permanent home or postal address changed since you last told us?

No ☐ **GO to question 5**

Yes ☐ Date of change (DD MM YYYY)

--	--	--	--	--	--

5 Select the type of arrangement you are requesting:

For more information, go to page 1 of the notes.

Tick all that apply



Option 1: Person permitted to enquire

☐

They can ask questions about your payments and services. They cannot make updates to your payments and services.



Option 2: Person permitted to update

☐

They can ask questions about your payments and services and provide information to update your payments and services.



Option 3: Correspondence nominee

☐

They can ask questions about your payments and services, tell us about changes to your circumstances, complete and sign forms/statements, attend appointments with you or on your behalf (if appropriate) and get copies of your letters from us.



Option 4: Payment nominee

☐

They can receive your Centrelink payments on your behalf. Provide your nominee's account details at **question 11**.

6 How long do you want this type of arrangement for?

Indefinitely ☐ or until (DD MM YYYY)

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Part C – Customer declaration and Third Party authorisation

8

Tick one only

I declare that I am able to ☐ **GO** to **Customer Declaration** below

or If the customer is not able to ☐ **GO** to **Third Party authorisation** below

Read this before continuing. Make sure you have read **Privacy and your personal information** on page 1 of this form.

Customer declaration

If the customer is able to make their own decisions but is not able to sign this form, it may be signed by their Power of Attorney.

Tick this box if a Power of Attorney is signing the customer declaration ☐



The Power of Attorney needs to provide:

- a copy of the legal documents
- photo identification for the attorney, such as an Australian driver licence or valid passport
- if there are multiple attorneys with majority or joint decision making, you will need to copy this page and provide the name and signature of each attorney.

Name of the Power of Attorney

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

I authorise the person or organisation named on this form, to deal with Services Australia on my behalf according to the type of arrangement shown on this form.

I understand that:

- this is voluntary and I can cancel this arrangement at any time.
- the type of arrangement may be rejected or cancelled at any time by Services Australia, if the person or organisation is not able to meet their responsibilities and obligations.
- giving false or misleading information is a serious offence.

Your signature



Date

(DD MM YYYY)

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You have now completed **Part C**.
The **authorised person or organisation**
is to complete **Part D**.

► **GO** to question 9

Third Party authorisation

If the customer is not able to sign this form due to physical or mental disability and the type of arrangement is in the person's best interest, a third party may sign this section on their behalf.



An appropriate third party may be one of the following and they must provide evidence as outlined below:

- a relevant professional, for example, a treating doctor, nurse, case worker or social worker
 - provide a letter or the medical evidence of the customer's incapacity
- the holder of an Enduring Power of Attorney (financial and/or legal decisions)
 - provide a copy of the legal document and medical evidence
 - provide photo identification for the attorney, such as an Australian driver licence or valid passport
 - if there are multiple attorneys with majority or joint decision making, they must all provide a letter or signature with their agreement
- the person or organisation holding a guardianship, financial management or administration order
 - provide a copy of the order or certificate.

Will receiving Centrelink or aged care letters cause distress or confusion for the customer? No ☐ Yes ☐

Name of the third party

--

Relationship to customer

--

Address

Postcode

Contact phone number
(including area code)

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I declare that:

- the customer is not able to sign this form due to physical or mental disability.
- it is in the customer's best interest to authorise the person or organisation named on this form, to deal with Services Australia on the customer's behalf according to the type of arrangement shown on this form.
- the information I have provided in this form is complete and correct.

Signature of the third party



Date

(DD MM YYYY)

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You have now completed **Part C**.
The **authorised person or organisation** is to complete **Part D**.

► **GO** to question 9

Part D – To be completed by the authorised person or organisation

9 Do you have any of the following:

Power of Attorney (financial and/or legal decisions) ☐

Enduring Power of Attorney (financial and/or legal decisions) ☐

Guardianship order ☐

Financial management/administration order ☐

None of the above ☐



Provide a copy of any documents ticked above.

10 **PASSWORD** – For security purposes, we will ask for this password every time you contact us.

Provide a password

The password needs to have 4 to 12 letters or numbers.

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Payment nominee only to complete

This is not applicable if you are only accessing aged care services.

11 Will you be receiving payments on behalf of the customer?

No ☐ **GO to question 12**

Yes – by deposit ☐ Give Deposit account details below into account

Yes – by group ☐ Give Group payment details below payment

Complete this if you are a payment nominee.

It may be easier as a nominee to manage the payments by having a separate account. As a nominee you must tell us if this account changes.

Deposit account

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

Group payment

Group Payment organisations – enter 3 character

Group Institution Code (if applicable)

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Authorised person or organisation declaration

12 Make sure the authorised person and/or organisation details are correct in **question 7**.

For more information about the responsibilities and obligations as an authorised person or organisation, refer to the **Notes**.

Read **Privacy and your personal information** on page 1 of this form.

I declare that I:

- understand and accept the responsibilities and obligations for the type of arrangement requested in this form.
- will act in the best interest of the customer.

I understand that:

- any personal information I am given access to under this type of arrangement is protected under Commonwealth legislation. I agree to access, use or disclose the information only as authorised by the person to whom the information relates.
- the type of arrangement may be rejected or cancelled at any time by Services Australia, if I am not able to meet my responsibilities and obligations.
- giving false or misleading information is a serious offence.

Signature of the authorised person or organisation

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Date (DD MM YYYY)

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Your relationship with the customer

Tick one only

Parent of customer ☐

Child of customer ☐

Legal guardian ☐

Partner ☐

Sibling ☐

Grandparent of customer ☐

Grandchild of customer ☐

Other relative ☐

Organisation ☐

Professional ☐

Other ☐ Give details below

Checklist

Identity requirements – Authorised person – (question 7) or Power of Attorney (question 8)

- authorised person, or
- Power of Attorney, either completing the customer declaration or Third Party authorisation section, is required to provide photo identification in person at one of our service centres, agents or access points. For locations go to servicesaustralia.gov.au/findus.



Which of the following documents are you providing with this form?

Provide a copy of the relevant documents. They do not need to be certified and will not be returned to you.

Tick all that apply	
Customer declaration – I am able to make my own decisions (question 8)	
If the Power of Attorney completes the customer declaration, they will need to provide	
• the Power of Attorney (financial and/or legal decisions) document – if there are multiple attorneys with majority or joint decision making, you will need to copy page 3 of the form and provide the name and signature of each attorney	☐
• photo identification for the attorney, has been provided in person to a service centre, agent or access point	☐
Third Party authorisation – the customer is not able to make their own decisions (question 8)	
If a third party provides authorisation, they must provide evidence as outlined below	
• a relevant professional, for example, a treating doctor, nurse, case worker or social worker – a letter or the medical evidence of the customer's incapacity	☐
• the holder of an Enduring Power of Attorney (financial and/or legal decisions) – a copy of the legal document and medical evidence of the customer's incapacity	☐
– photo identification for the attorney, has been provided in person to a service centre, agent or access point	☐
– if there are multiple attorneys with majority or joint decision making, they must all provide a letter or signature with their agreement	☐
• the person or organisation holding a guardianship, financial management or administration order – a copy of the order or certificate	☐
If your authorised person or organisation holds any of the following, they will need to provide a copy of the documents (question 9)	
• Power of Attorney (financial and/or legal decisions)	☐
• Enduring Power of Attorney (financial and/or legal decisions)	☐
• Guardianship order	☐
• Financial management/administration order	☐

Stopping your arrangement

You can cancel your arrangement at any time, unless it is a court, tribunal, guardianship or an administration appointed arrangement.

If you cancel your nominee arrangement, a letter will automatically be sent to you and your nominee.

To cancel the type of arrangement:

- call us – go to servicesaustralia.gov.au/phoneus
- use your **online account** to cancel or change your correspondence and/or payment nominee at any time
- write to us – go to servicesaustralia.gov.au/contactus

Centrelink may review, reject or cancel your type of arrangement at any time. This includes if the person or organisation is not able to meet their responsibilities and obligations.

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
- post to: Services Australia, PO Box 7800, CANBERRA BC ACT 2610
- fax to: 1300 786 102
- in person at one of our service centres.