

Online account



Completing this form online is faster.

You can only give us your details online if the person moving into an aged care home has completed their aged care calculation of their cost of care online. When they do this, they will get an Application ID and Temporary Access Code (TAC). They will need to give this to you so you can complete your assessment online **within 21 days** of their application being submitted.

To complete your assessment online:

- go to the Services Australia website at **servicesaustralia.gov.au**
- in the search field type **Aged care carer or close relative assessment**
- select **Aged care carer or close relative assessment for aged cost of care**
- then **What you need to do**
- then **Aged care carer or close relative assessment login**
- enter your **Application ID** and **Temporary Access Code**, then select **Login**
- complete the questions in each section to progress.

If you cannot give us your details online

If you get an income support payment, call the Aged Care line on **1800 227 475** to give us permission to do your assessment.

When to use this form



Use this form if you:

- do not get an income support payment from us
- are a carer or close relative living in the home of a person requesting an aged care calculation of their cost of residential care.

This form:

- collects information about your eligibility for an Australian Government means tested income support payment
- is **not a claim** for an income support payment.

Important information

The collection of your (and/or your partner's) personal information on this form is voluntary. If you choose to provide this information it will be used to determine fees payable by the care recipient to their registered provider under the *Aged Care Act 2024*.

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**

For more information



Go to **servicesaustralia.gov.au** and search 'carer or close relative assessment'.

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'.

6 Your date of birth (DD MM YYYY)

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7 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

Other name

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Type of name (for example, name at birth)

--

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

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

Providing a mobile phone number or an email address means you may receive SMS or emails from us. To read the terms and conditions, go to servicesaustralia.gov.au/em

Your contact details

Phone number (including area code)

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Email

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9 What is your current address?

Postcode

10 Postal address if different to current address

Postcode

11 How long, including current and previous addresses, have you been living with the person requesting a calculation of their cost of care?

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 Provide documents, for example, account statements or utility bills or receipts showing the address(es) for the period you have lived with this person.

12 Which best describes your residence status?

I am an Australian citizen **who was born in Australia** ☐ Go to next question

I am an Australian citizen **who was born overseas** ☐ Date citizenship granted (DD MM YYYY)

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I am a permanent resident visa holder ☐ Visa subclass

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Date current visa granted (DD MM YYYY)

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Other ☐ Give details below

13 Do you have a partner?

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.

We may still consider you to have a partner if you are not physically living with them. For example, your partner may fly-in fly-out or live away for work, like military or oil rig workers.

No ☐

Yes ☐

14 Which of the following options best describes your current circumstances?

Tick all that apply

I am a carer

☐

How many hours do you do paid or voluntary work, study or training?

per week

 Provide documents, for example, payslips, time sheets or a letter from your employer, with the hours you do per week.

I have a disability or medical condition which means I cannot work, study or do any training for the next 2 years

☐

I am a full-time student

☐

I am unemployed and looking for work

☐

I am self-employed

☐

I am a farmer

☐

I have dependent child(ren)

☐

Age of your youngest child

None of the above

☐

15 Have you notified your partner that their personal and financial information will be collected by Services Australia in this form for the purpose of calculating fees and subsidies under the *Aged Care Act 2024*?

Not applicable ☐ Go to next question

No ☐ Your partner needs to be made aware before you continue filling in this form.
▶ Go to next question

Yes ☐ Go to next question

16 What is the total gross **income** you (and/or your partner) receive?

Include:

- employment income
- income streams
- government income
- real estate income
- foreign income
- business income
- dividends from shares.

\$ per year

 Provide documents, for example, payslips showing the income you (and/or your partner) receive per year.

17 Do you (and/or your partner) **have an interest in a private trust and/or private company**?

No ☐ Go to next question

Yes ☐

 Provide documents, for example, your personal income tax return showing your interest in the private trust and/or private company.

▶ Go to next question

18 Do you (and/or your partner) have any **money in bank accounts, shares or other financial assets**?

No ☐ Go to next question

Yes ☐ What is the total current value?

\$

 Provide documents, for example, bank statements, passbooks or share statements, showing details of their current value.

▶ Go to next question

19 Do you (and/or your partner) have any **real estate or business assets** including **farm assets**?

No ☐ Go to next question

Yes ☐ Give details below

Total current market value

\$

Total balance of loan(s) taken to purchase

\$

 Provide documents showing the current value of each asset and a statement for each loan.

▶ Go to next question

20 What is your estimate of the **current market value** of your (and/or your partner's) **household contents** and **personal effects**?

The **current market value** of the household contents and personal effects is what you would expect to get if you sold them. It is not the replacement or insured value.

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 and hobby collections (for example, stamps, coins).

Do not include:

- fixtures such as stoves and built-in items.

Current market value

\$

Balance of loan(s) taken to purchase

\$

- 21 Do you (and/or your partner) own or partly own any motor vehicles, motor cycles or trailers?

Including boats and caravans

No ☐ Go to next question

Yes ☐ Give details below

Current market value

\$

Balance of loan(s)
taken to purchase

\$

- 22 In the last 5 years, have you (and/or your partner) **gifted** 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:

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

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.

- 23 Do you (and/or your partner) own any other assets (in or outside Australia) that you have not already told us about on this form?

Include:

- taxi plates
- time share
- racehorses
- greyhounds
- 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 NDIS.

No ☐ Go to next question

Yes ☐ Give details below



Provide documents showing details and the current value of each asset.

- 1 Description of asset

Current market value

Balance of loan(s)
taken to purchase

Currency if not AUD

Your share

%

Partner's share

%

Continued

2 Description of asset		
Current market value	Balance of loan(s) taken to purchase	
Currency if not AUD	Your share	Partner's share
	%	%

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

Privacy notice

24 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 determine fees payable by the care recipient to their registered provider. 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 of the carer or close relative

25 I declare that:

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

I understand that:

- Services Australia can make relevant enquiries to make sure I receive the correct entitlement
- giving false or misleading information is a serious offence.

Carer or close relative's signature



Date (DD MM YYYY)

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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 the address(es) for the period you have lived with this person (required at question 11)	☐
Documents showing the hours you do per week (required at question 14)	☐
Documents showing income received per year (required at question 16)	☐
Documents showing interests in a private trust and/or private company (if you answered Yes at question 17)	☐
Documents showing details for bank accounts, shares or other financial assets (if you answered Yes at question 18)	☐
Documents showing the current value of any real estate or business assets and a statement for each loan (if you answered Yes at question 19)	☐
Documents showing details and the current value of each asset (if you answered Yes at question 23)	☐

Returning this form

The person who needs the calculation of their cost of care can return this form and any supporting documents:

- **online** using their Centrelink online account. For more information, go to servicesaustralia.gov.au/centrelinkuploaddocs
- by post to
Services Australia
Residential Care
PO Box 7821
CANBERRA BC ACT 2610