

Version	Version No.	Date	Description of content edited
Current	6.0	09/01/2025	Updates to call prompts
Previous	5.0	09/08/2024	Renamed to include inbound

Youpla Support Program

Inbound Call Prompts

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Greeting

s 47E(d)

Confirm purpose of the call

s 47E(d)

If purpose of the call is not confirmed.

s 47E(d)

If purpose of the call is confirmed, seek permission to access their Centrelink record.

s 47E(d)

Explaining why if asked

s 47E(d)

If permission is given

s 47E(d)

Follow normal procedures for accessing a Centrelink record and proof of record ownership.

If permission is not given

s 47E(d)

If speaking with assistance/legal nominee without a former member present

s 47E(d)

Ask open question to continue the conversation.

s 47E(d)

s 47E(d)

Acknowledge the questions asked.

s 47E(d)

s 47E(d)

I need urgent assistance with a resolution payment for
Sorry Business

s 47E(d)

If they have passed on or after the 1 of June

s 47E(d)

Follow process to warm transfer to SO5.

If the SO5 is unavailable.

s 47E(d)

Eligibility criteria

s 47E(d)

What former members may be eligible for?

s 47E(d)

If former members ask for further information on resolution payments, you can refer them to the [Youpla Support Program](#) page on the NIAA website

What if I have signed up for a new funeral insurance?

s 47E(d)

What if the person who paid for the policy has passed away?

s 47E(d)

If I'm eligible for a payment, how will they decide how much money I get, and why won't I get all the money I paid to Youpla Group?

s 47E(d)

What happens to the other 40% of my Youpla money?

s 47E(d)

Services Australia's role

s 47E(d)

Can I provide documentation for the program?

s 47E(d)

Consent and documenting consent

If asked what implied consent is

s 47E(d)

If you are following up consent.

s 47E(d)

I consent to my information being shared with Services Australia

s 47E(d)

If permission was given to access Centrelink record and customer has provided consent for the information transfer

s 47E(d)

If permission was NOT given to access Centrelink record and customer has provided consent for the information transfer

s 47E(d)

What will that mean that we need to do today?

s 47E(d)

I do NOT consent to my information being shared with Services Australia

s 47E(d)

If answered no to continuing to withdraw consent

Continue the conversation

If answered yes to continuing withdrawing consent

s 47E(d)

If answered yes to providing additional information to withdraw consent

s 47E(d)

If answered no to providing additional information to withdraw consent

s 47E(d)

If permission was NOT given to access Centrelink record and customer is withdrawing consent from the information transfer

s 47E(d)

What will that mean that we need to do today?

s 47E(d)

Contact details check.

Currently on ISP

s 47E(d)

Not currently on ISP

s 47E(d)

If answered no to reviewing/updating contact details

s 47E(d)

If answered yes to reviewing/updating contact details and is linked with a nominee and/or partner.

s 47E(d)

s 47E(d)

What information do you have regarding Centrepay and Youpla Group Members?

s 47E(d)

I would like to lodge a complaint.

s 47E(d)

Complaint about policy (eligibility, NIAA, program etc.)

s 47E(d)

Complaint about process (information transfer, Services Australia etc.)

s 47E(d)

Follow standard process as per Complaints Index

How will the resolution payment impact my Income Support Payment?

s 47E(d)

What will happen next?

s 47E(d)

How long will it take to receive my cash payment?

s 47E(d)

Restricted Access caller

s 47E(d)

Repeated calls

Youpla information not on record

s 47E(d)

Case Manager allocated

s 47E(d)

I am a third party organisation and I want to enquire about a clients Youpla Support Payment.

s 47E(d)

I am a third party organisation and I want to seek a reimbursement for the costs of a funeral

s 47E(d)

Version	Version No.	Date	Description of content edited
Current	3.0	17/12/2024	Updated attachment > I don't have a bank account
Previous	2.0	05/09/2024	Updated attachment > I have multiple policies

Youpla Support Program

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Greeting

s 47E(d)

If answered yes to speaking with the Service Officer

s 47E(d)

If answered no to the Service Officer verifying customers identity

s 47E(d)

Confirm purpose of the call once identify has been confirmed

s 47E(d)

If answered no to speaking with the Service Officer

s 47E(d)

Can my nominee speak to you?

s 47E(d)

If identified, that they have a legal nominee.

s 47E(d)

Consent and documenting consent

If asked what implied consent is

s 47E(d)

I do NOT consent to my information being shared with Services Australia

s 47E(d)

If answered no to continuing to withdraw consent

Continue the conversation.

If answered yes to continuing withdrawing consent

s 47E(d)

Contact details check.

Currently on ISP

s 47E(d)

Not currently on ISP

s 47E(d)

If answered no to reviewing/updating contact details

s 47E(d)

If answered yes to reviewing/updating contact details and is linked with a nominee and/or partner.

s 47E(d)

If yes to checking nominee/and or partner details

s 47E(d)

If no to checking nominee/and or partner details

s 47E(d)

Eligibility criteria

s 47E(d)

What former members may be eligible for?

s 47E(d)

If former members ask for further information on resolution payments, you can refer them to the [Youpla Support Program](#) page on the NIAA website

If I'm eligible for a payment, how will they decide how much money I get, and why won't I get all the money I paid to Youpla Group?

s 47E(d)

What happens to the other 40% of my Youpla money?

s 47E(d)

Cash payment and funeral bond provider.

Former member is unsure of which option to select.

s 47E(d)

What if I change my mind?

s 47E(d)

How long will it take to receive my cash payment?

s 47E(d)

What if I don't have a bank account in my name?

s 47E(d)

What is the verbal agreement script?

s 47E(d)

I have multiple policies.

Can I choose different payment options for each of my policies?

s 47E(d)

I have more policies than you have recorded, what can I do?

s 47E(d)

s 47E(d)

Financial Counselling

What are the benefits of financial counselling?

s 47E(d)

Will I have the option of a financial counsellor for any other policy information you receive?

s 47E(d)

What if I am bankrupt?

s 47E(d)

Funeral Bond Provider

s 47E(d)

s 47E(d)

What if I have signed up for a new funeral insurance?

s 47E(d)

Funeral Bond referral

s 47E(d)

Is my family member/friend eligible?

s 47E(d)

Can Services Australia call my family member/friend?

s 47E(d)

My family member/friend requires an emergency payment for sorry business

s 47E(d)

What information do you have regarding Centrepay and Youpla Group Members?

s 47E(d)

I would like to lodge a complaint.

s 47E(d)

Complaint about policy (eligibility, NIAA, program etc.)

s 47E(d)

Complaint about process (information transfer, Services Australia etc.)

s 47E(d)

Follow standard process as per Complaints Index

I am a third party organisation and I want to enquire about a clients Youpla Support Payment.

s 47E(d)

s 47E(d)

I am a third party organisation and I want to seek a reimbursement for the costs of a funeral

s 47E(d)

Youpla Support Program

Automated scripts - verbal agreements

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For Resolution Payment

s 47E(d)

For Resolution Payment as a Funeral Bond

s 47E(d)

Version	Version No.	Date	Description of content edited
Current	1.0	10/03/2025	New attachment

SME Call Prompts

Explain the Sorry Business process

s 47E(d)

Explain the Next of Kin evidence required

s 47E(d)

Explain the requirement for the lump sum payment to be paid into an account the customer has legal access to

s 47E(d)

Explain the delay in lump sum payments being processed for Public/State Trustees

s 47E(d)

s 47E(d)

Frequently Asked Questions

What if a funeral home or other third party contacts the agency to seek funds for Sorry Business?

s 47E(d)

Why do I need to provide evidence?

s 47E(d)

Why do I need to provide a statutory declaration?

s 47E(d)