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)

Acknowledge the questions asked.

s 47E(d)

s 47E(d)

## I need urgent assistance with a resolution payment for Sorry Business

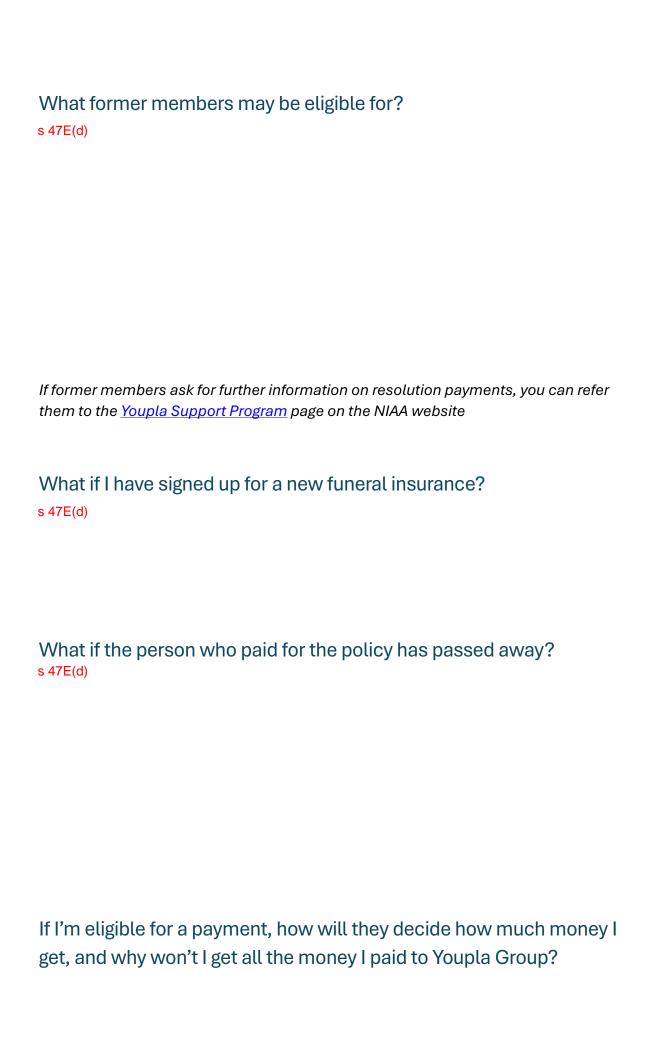
s 47E(d)

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



|--|

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.

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)

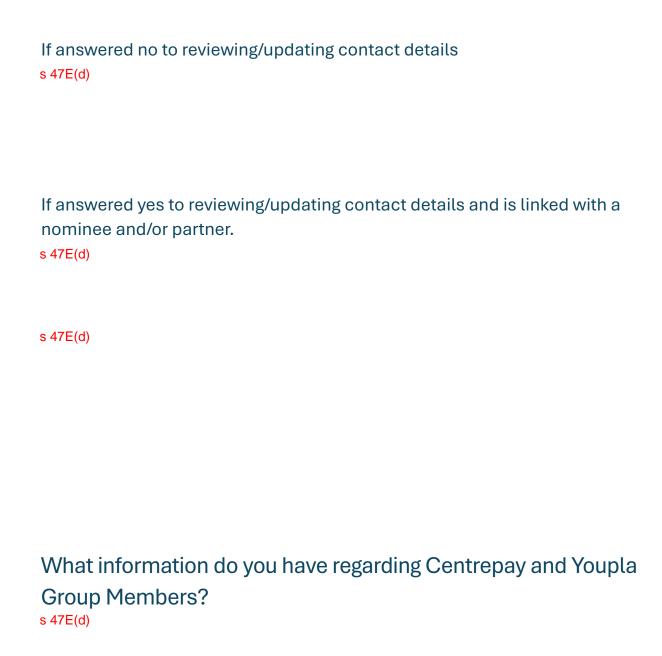
What will that mean that we need to do today? s 47E(d)

#### Contact details check.

Currently on ISP

s 47E(d)

Not currently on ISP



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?

#### 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.

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

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**

## **Outbound & Case Management Call Prompts**

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

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?

If former members ask for further information on resolution payments, you can refer them to the <u>Youpla Support Program</u> 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)

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What is the verbal agreement script?

## 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)

## Financial Counselling

What are the benefits of financial counselling?

s 47E(d)

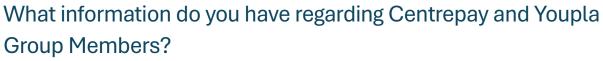
Will I have the option of a financial counsellor for any other policy information you receive?

s 47E(d)

What if I am bankrupt?

Funeral	Bond	Provider
		1 1 1 / / / I / / / / / / / / / / / / /

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



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.

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

# Youpla Support Program Automated scripts - verbal agreements

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For Resolution Payment

## 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

### 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?