

s22 (out of scope)



## **Australian Government**

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### **Services Australia**

#### **Italy Agreement and foreign pension information 106-04019000**

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#### **Background**

s22 (out of scope)

This document outlines information about the Agreement including the process of making a claim for Australian payment under the Agreement and coding of Italian payments.

#### **Start date**

The Agreement with Italy:

- started on 1 September 1988, and
- was revised on 1 October 2000

#### **Claiming and benefits covered**

The Italian Agreement allows customers to lodge a claim for payment from either country. It also allows customers to add together periods of residence in Australia and periods of social security coverage in Italy, to meet the minimum requirements for payment.

#### **Australian payments covered:**

- Age Pension
- Disability Support Pension (DSP)
- Carer Payment (CP)
- Parenting Payment Single (PPS)
- Double Orphan Pension (DOP)

#### **Note:**

- Only 'severely disabled' customers can be granted DSP
- Only carer partners of Age Pension or DSP customers can be granted CP
- Only 'widowed persons' can be granted PPS
- The [DOP and Bereavement Smart Centre Processing Team](#) assess and code all DOP claims. **s47E(d)** For help, see [Bereavement/Double Orphan Pension Helpdesk](#)

Customers can [claim Australian payments under the Agreement](#) by contacting Services Australia or the Italian authorities.

**Italian payments** covered:

- Old Age Pension
- Invalidity Pension
- Survivor Pension
- Social Pension
- Unemployment Allowance

Customers can [claim a foreign pension](#) by contacting Services Australia or the Italian authorities.

**Information on International Agreements**

Information on how International Agreements work and general concepts used in agreements is contained in [International Social Security Agreements](#).

The [Resources](#) page has a link to:

- Residence and International program
- Centrelink International Services (CIS)
- Services Australia website

**Related links**

[International Social Security Agreements](#)

[Claims for Australian payments under International Agreements](#)

[Foreign pension claims](#)

[Foreign Pension coding](#)

[Agreement liaisons, NZ CICs and exchange of information](#)

[Comparable Foreign Payment \(CFP\) lump sum arrears debts](#)

[Assessing if a customer is an Australian resident](#)

## Process

This document outlines information about the Agreement including the process of making a claim for Australian payment under the agreement and coding of Italian payments.

## General information

### Social Security Agreement between Australia and Italy

Category title	Description
<p><b>Italian Social Security System</b></p>	<p><b>Italian Social Security System</b> + Read more ...</p> <p>In Italy, the pension insurance legislation requires the compulsory payment of social security contributions on behalf of employees, usually through deductions from paid employment.</p> <p>Contributions insure employees against disability and unemployment and provides for income in the form of a pension once the person reaches retirement age.</p> <p>The legislation is the responsibility of the Italian federal government but the collection of contributions and payment of pensions is the responsibility of the various pension funds. These are broadly arranged to cover the different industries.</p> <p>In addition to the contribution based system, there is also a welfare system which gives benefits to people who are not covered by the contributory system. Payments under the welfare system are income tested and generally paid at a lower rate than those paid under the contributory scheme.</p>
<p><b>History and previous Agreements</b></p>	<p><b>Widow B Pension, Wife Pension and Bereavement Allowance</b> + Read more ...</p>

	<p>Widow B Pension and Wife Pension were sunsetted in 1995 and, along with Bereavement Allowance, ceased to be paid from 2020. See:</p> <ul style="list-style-type: none"><li>• <a href="#">Widow B Pension</a></li><li>• <a href="#">Wife Pension</a></li><li>• <a href="#">Bereavement Allowance</a></li></ul> <p><b>Original Agreement - 1 September 1988</b> + Read more ...</p> <p>The original Agreement with Italy covered:</p> <ul style="list-style-type: none"><li>• Age pensions</li><li>• Invalid pensions (now Disability Support Pension)</li><li>• Wife pensions</li><li>• Spouse carer pensions (now Carer Payment)</li><li>• Double orphans' pensions</li><li>• Additional pensions and allowances for children and</li><li>• Pensions payable to widows:<ul style="list-style-type: none"><li>○ Sole parent pension (now Parenting Payment Single)</li><li>○ Widow pension</li><li>○ Bereavement allowance</li></ul></li></ul> <p><b>Note:</b></p> <ul style="list-style-type: none"><li>• There was no requirement for invalid pensions (DSP) to be severely disabled</li><li>• Carer pensions were required to be partners of Australian pensioners</li><li>• Widow (female only) were required to have been married (de jure) or 'dependant female'</li></ul> <p><b>Provisions under the 1988 Agreement that continue to apply</b> + Read more ...</p>
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	<p>Payments granted under the 1988 Agreement continue to be subject to the provisions of that Agreement.</p> <p>Portability for all listed payments is indefinite to any country.</p> <p>A Comparison Rate applies to a customer paid under the 1988 Agreement in Australia (Article 8.3). The Comparison Rate continues to apply to a customer paid outside Australia under the 1988 Agreement (Article 8.9) who:</p> <ul style="list-style-type: none"> <li>• was an Australian resident on 8 May 1985, and</li> <li>• was granted before 1 January 1996, and</li> <li>• left Australia before 1 January 1996</li> </ul> <p>This continues to apply until the direct deduction rate is higher.</p> <p>Customers paid under the 1988 Agreement outside Australia are not subject to the proportional rate (Article 8.8) if:</p> <ul style="list-style-type: none"> <li>• the qualifying event occurred while an <a href="#">Australian resident</a>, for example, Continuing Inability to Work (CITW) for Disability Support Pension (DSP), or:</li> <li>• the customer <ul style="list-style-type: none"> <li>○ was an Australian resident on 8 May 1985, and</li> <li>○ was granted before 1 January 1996, and</li> <li>○ left Australia before 1 January 1996</li> </ul> </li> </ul> <p>This continues to apply until the customer returns to Australia for more than 26 weeks.</p> <p>Once the savings provisions cease to apply, code the current Agreement <b>s47E(d)</b> that is, 2000.</p>
<p><b>Authorities, Institutions and Liaison Agencies</b></p>	<p>Contact details for <a href="#">foreign pension authorities</a> are available in the <b>s47E(d)</b></p> <p><b>Patronati</b> + Read more ...</p>

	<p>Patronati are employed worldwide to assist a person who has been an Italian resident or is of Italian descent with claiming and maintaining an Italian pension. See <a href="#">Italian Patronati</a>.</p> <p><b>Competent authorities</b> + Read more ...</p> <p><b>For Australia</b></p> <p>Department of Social Services (DSS)</p> <p><b>For Italy</b></p> <p>Ministero del Lavoro e delle Politiche Sociali – Ministry of Labour and Social Policies</p> <p><b>Competent institutions</b> + Read more ...</p> <p><b>For Australia</b></p> <p>Services Australia</p> <p><b>Note:</b> the Australian Taxation Office (ATO) is responsible for <a href="#">double coverage</a> provisions.</p> <p><b>For Italy</b></p> <ul style="list-style-type: none"> <li>• Istituto Nazionale della Previdenza Sociale (INPS)</li> <li>• Ente Nazionale Previdenza ed Assistenza per i Lavoratori dello Spettacolo (ENPALS) - entertainers</li> <li>• Istituto Nazionale di Previdenza per i Giornalisti Italiani (INPGI) - journalists</li> <li>• Istituto Nazionale di Previdenza per i Dirigenti di Aziende Industriali (INPDAI) - managers in industry</li> </ul> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• The INPDAI fund was abolished in 2003. Responsibilities were transferred to INPS. A customer claiming a pension based on INPDAI contributions should claim with INPS</li> <li>• INPS also administer payments previously made under the INPDAP scheme. INPDAP remains outside the scope of the Agreement and INPDAP contributions <b>cannot</b> be used for totalisation.</li> </ul>
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	<p><b>Liaison agencies</b> + Read more ...</p> <p><b>For Australia:</b></p> <p>Centrelink International Services (CIS)</p> <p><b>Note:</b> the Australian Taxation Office (ATO) is responsible for <a href="#">double coverage</a> provisions.</p> <p><b>For Italy:</b></p> <p>See 'Competent institutions' above.</p> <p><b>Note:</b> all liaison and claims for Australian residents or cases paid under the 1988 Agreement should be sent to INPS Ancona. The various funds are responsible for all other cases.</p> <p>The various funds can be identified by the office code on the Italian reference number. A list of office codes, including the smaller provincial offices not in the <a href="#">CODES facility</a>.</p>
<p><b>Italian Patronati</b></p>	<p><b>Patronati</b> + Read more ...</p> <p>The Patronati:</p> <ul style="list-style-type: none"> <li>• are private enterprises engaged by the Italian government to help a person who has been an Italian resident or is of Italian descent regarding their welfare and rights</li> <li>• are set up to help customers to claim and maintain an Italian pension and are experienced in the associated complex requirements</li> <li>• may also help their customers to claim a pension from another country, e.g., Switzerland, Germany etc.</li> </ul> <p><b>Assistance offered by the Patronati</b> + Read more ...</p> <p>Patronati help customers to:</p> <ul style="list-style-type: none"> <li>• complete Italian claim forms, including Life Certificates and Mod Red Campaign</li> </ul>

	<ul style="list-style-type: none"><li>• claim further Italian benefits, for example, family allowance</li><li>• request information from service centres on behalf of an INPS office</li><li>• lodge an appeal with an INPS office</li><li>• deal with the agency</li><li>• deal with taxation issues</li><li>• claim from other countries, for example, Italians who have worked in Germany, Switzerland etc</li></ul> <p>Customers:</p> <ul style="list-style-type: none"><li>• need to provide a mandate for help by a Patronato. Any help given by a Patronato is free of charge</li><li>• should be encouraged to lodge Italian pension claims through and seek help offered by Patronati for ongoing issues, such as:<ul style="list-style-type: none"><li>○ <a href="#">Life Certificates</a></li><li>○ <a href="#">The Mod Red Campaign</a></li></ul></li></ul> <p>Contact details for Patronati are available in the <a href="#">s47E(d)</a></p> <p><b>Note:</b></p> <ul style="list-style-type: none"><li>• Services Australia <b>must not</b> advertise or recommend any individual Patronato office. See Dealing with the Patronati below</li><li>• foreign pension claims lodged through a Patronato office are not to be coded as sent overseas direct as the Patronato office will send the claim to Centrelink International Services (CIS). If a customer indicates they have lodged a foreign pension claim with a Patronato office, transfer the case to CIS. See <a href="#">Assisting customers to claim a foreign pension</a></li></ul> <p><b>Authority to deal with the Patronati</b> + Read more ...</p>
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Since customers generally provide a mandate for assistance, the Patronato takes on the function of Customer Agent. Services Australia can deal with them as if they are the customer and release information them (see part 5.3060 Customer Authority for Release – Express Authority in the [Privacy and Secrecy intranet page](#)).

#### **Signed mandate**

When a signed mandate is received, the customer appointed Patronato details are coded on the **s47E(d)**

Where the customer signs a mandate with a specific Patronato, **any** employee of the Patronato can act on the customer's behalf. **s47E(d)**

#### **Unsigned mandate**

If the mandate form is not signed, Patronati can also be seen as a member for a 'helping' profession. Member of the 'helping' profession are seen as acting in the interest of a customer and an implied authority can be taken to be in place. See the [Privacy and Secrecy intranet page](#).

#### **Dealing with the Patronati + Read more ...**

Patronati are a commercial enterprise.

They represent different Italian organisations (about 8 in Australia) and are in competition with each other for 'processing points'. That is, they are funded according to the number of claims they help with.

Services Australia **must not** advertise or recommend any individual Patronato office.

	<p>If a Patronato office:</p> <ul style="list-style-type: none"> <li>• other than appearing on the customer's <b>s47E(d)</b> contacts Services Australia, the enquiring Patronato <b>must</b> provide a current customer authorisation, evidencing that the Patronato is now administering the customer's affairs <ul style="list-style-type: none"> <li>○ A Patronato would have a Revocation Mandate Order if they are taking over mandate from another Patronato as the client's agent</li> <li>○ Once evidence has been provided the new Patronato Office <b>must</b> be recorded on the <b>s47E(d)</b></li> </ul> </li> <li>• is <b>not</b> coded on the <b>s47E(d)</b> (for example, new grant) and a Patronato mandate for assistance has not yet been received, the Patronati can be seen as a member of a 'helping' profession <ul style="list-style-type: none"> <li>○ The Patronati are seen as acting in the interest of a customer and an implied authority can be taken to be in place. See the <a href="#">Privacy and Secrecy intranet page</a></li> </ul> </li> </ul> <p><b>Information to provide to the Patronato</b></p> <p>Details given to a Patronato should be limited to data generated by the customer's Services Australia entitlement (for example, Customer Reference Number (CRN), rate details etc).</p> <p>A Patronato should not need to ask basic information about our mutual customers, for example, their address, marital status or Italian pension reference. This is information the Patronato can get from the customer and a Service Officer must not provide it to them if they ask.</p> <p>Patronato requests for bulk information about multiple customers are limited to the annual <a href="#">Mod Red</a></p>
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	<p><a href="#">Campaign</a> which is administered by the <a href="#">Residence and International program</a>.</p>
<p><b>Exchange of information and liaison forms</b></p>	<p>See <a href="#">Agreement Country Document Catalogue (ACDC)</a> for samples of forms, foreign documents and translations.</p> <p><b>Exchange of information</b> + Read more ...</p> <p>Under the Agreement with Italy, information held about customers may be exchanged between the Liaison Agencies to determine entitlement to payments under the Agreement and under either country's domestic legislation (Article 20.1).</p> <p>For information on bulk data exchange, see <a href="#">International Data Exchange Program and auto-indexation of foreign pensions</a>.</p> <p><b>Australia liaison form</b> + Read more ...</p> <p>The following liaison form is completed by Centrelink International Services (CIS) and sent to Italy.</p> <ul style="list-style-type: none"> <li>• <b>AUS187IT</b> - Australia/Italy Agreement on Social Security</li> </ul> <p>For help with creating and completing the liaison form, see <a href="#">Agreement liaisons, NZ CICs and exchange of information</a>.</p> <p><b>Italy liaison forms</b> + Read more ...</p> <p>The following liaison forms are completed by Italy and sent to Centrelink International Services (CIS).</p> <p><b>Transmittal/Request/Liaison Form - IT/AUS2</b></p> <p>This form is used in all communication from Italy.</p> <ul style="list-style-type: none"> <li>• <b>Section 1 - Address:</b></li> <li>• <b>Section 2 - Reference Numbers:</b></li> <li>• <b>Section 3 - Applicant:</b></li> <li>• <b>Section 4 - Contributor:</b> completed if not the applicant, for example, SUR</li> </ul>

	<ul style="list-style-type: none"> <li>• <b>Section 5 - Transmission of claim:</b> completed when sending an Australia claim</li> <li>• <b>Section 6 - Information provided by INPS:</b> completed when providing information to Australia, including Italian periods of coverage (attachment) and notifying grant of Italian pension</li> <li>• <b>Section 7 - Information requested by INPS:</b> completed when requesting information from Australia - Includes certification by INPS</li> </ul> <p><b>Insurance Periods Credited in Italy - IT/AUS3</b></p> <p>Statement of Italian periods of coverage</p> <p><b>Certificate Relative to Periods of Work in Australia (IT/AUS4)</b></p> <p>This form is used to confirm employment in Australia for the purposes of Italian unemployment allowance (Article 14) unlike verifying employment during working life residence (WLR). See <a href="#">Working Life Residence (WLR)</a>.</p> <p>For some other agreements, only employment in Australia is relevant regardless of what visa the person held at the time and whether or not they were residing in Australia. Periods of self-employment <b>cannot</b> be included.</p> <p>Evidence of employment includes tax returns (<b>not</b> Taxation Notices of Assessment), payment summaries (group certificates), payslips or other documents that verify actual employment.</p> <ul style="list-style-type: none"> <li>• <b>Part A:</b> this section indicates the person about whom the request is made, the period to be confirmed and the requesting agency</li> <li>• <b>Part B:</b> this section must be completed with details of the periods confirmed by Australia and certified by the Service Officer</li> </ul> <p>For help with processing a Certificate Relative to Periods of Work in Australia (IT/AUS4), see <a href="#">Agreement liaisons, NZ CICs and exchange of information</a></p>
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<p><b>Medical assessments</b></p>	<p><b>Medical assessments</b> + Read more ...</p> <p>Under the Administrative Arrangements, each country arranges a medical examination and sends copies of agreed from and existing medical information to the other country with claims for invalidity/disability payments from that country.</p> <p>Medical examinations may also be undertaken upon request for foreign pension claim purpose, unless acceptable evidence is available that is less than 12 months old. Generally, the liaison agency will contact Services Australia and request this be done. There is no provision for reimbursement of costs to either country.</p> <p>The customer must contact Services Australia if they receive a direct request from the liaison agency to undertake a medical examination. Advise them to undertake Services Australia's <a href="#">foreign pension medical assessment</a> process. Where the customer has already undertaken a medical examination based on a direct request from the Agreement partner without consulting Services Australia, the customer should contact the liaison agency to discuss any possible reimbursement options.</p> <p>If a customer is claiming reimbursement of costs based on undertaking a medical examination requested by Services Australia for foreign pension purpose, consider all evidence provided. <b>s47E(d)</b></p> <p>See <a href="#">Agreement Country Document Catalogue (ACDC)</a> for samples of forms, foreign documents and translations.</p>
<p><b>Double coverage/Taxation and Healthcare</b></p>	<p>See general information about <a href="#">early release of superannuation, refunds of contribution, double coverage, taxation and health insurance</a>.</p>

	<p><b>Double coverage/certificates of coverage</b> + Read more ...</p> <p>The Agreement with Italy does not include <a href="#">double coverage</a> provisions.</p> <p>Any enquiries about <a href="#">double coverage or certificates of coverage</a> should be directed to the <a href="#">Australian Tax Office (ATO) website</a>.</p> <p><b>Taxation</b> + Read more ...</p> <p>Any queries about taxation of pensions or the requirement to lodge a tax return should be directed to:</p> <ul style="list-style-type: none"> <li>• In the other country - the tax authority in that country</li> <li>• In Australia - the <a href="#">Australian Taxation Office (ATO) website</a></li> </ul> <p>See general information on <a href="#">taxation</a>, including issuing Australian <a href="#">payment summaries</a>.</p> <p><b>Tax treaty</b></p> <p>Australia has a double tax agreement with Italy which avoids the need for the customer to pay tax in both countries.</p> <p>A person who is 'resident' in one country (according to the definition in the tax agreement) generally only pays tax on pensions in that country.</p> <p>Tax deductions from income from one country may be allowed as a credit against tax payable in the other country.</p> <p><b>Tax deduction</b></p> <p>Italian pensions are taxed at the source. A customer in Australia may apply for an exemption from tax deductions. The form EP1/1 is included in the Italian claim pack.</p> <p>The gross rate of Italian pension, before <b>any</b> deduction, is maintained.</p> <p><b>Italian tax year</b></p>
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	<p>Italy uses the calendar year (1 January - 31 December) as the tax year. Customers receive a <a href="#">Mod CUD</a> notice each year for tax purposes.</p> <p><b>Note:</b> Mod CUD does not provide sufficient information to code or update Italian pensions.</p> <p><b>Health Insurance/Medicare</b> + Read more ...</p> <p>Australia has a <a href="#">Reciprocal Health Care Agreement (RHCA)</a> with Italy.</p> <p>See general information on <a href="#">health insurance and Medicare coverage</a>.</p> <p>Any queries about:</p> <ul style="list-style-type: none"> <li>• Health insurance coverage in the other country - tell the customer to contact the health insurance authority in the other country</li> <li>• Medicare coverage - direct them to <a href="#">Medicare</a></li> </ul>
<p><b>Additional Information</b></p>	<p><b>Languages</b> + Read more ...</p> <p>The official language of Italy is Italian.</p> <p>See <a href="#">Italian naming conventions and pronunciation</a>.</p> <p><b>Address and contact details</b> + Read more ...</p> <p>Telephone country code is +39.</p> <p><b>Street address:</b></p> <p>Title FirstName Surname [Addressee]</p> <p>VIALE EUROPA 22 [Street + premise number]</p> <p>00122 ROMA RM [Postcode + locality + province code]</p> <p>ITALY</p> <p><b>Apartment address:</b></p> <p>Title FirstName Surname [Addressee]</p> <p>VIA EUROPA 300/6 [Street name + premise number + / + apartment number]</p>

	<p>00144 ROMA RM [Postcode + locality + province code]</p> <p>ITALY</p> <p><b>Rural address – Variation 1:</b></p> <p>Title FirstName Surname [Addressee]</p> <p>VIA ARDEATINA KM 15,500 [Street and location per kilometre]</p> <p>00134 ROMA RM [Postcode + locality + province code]</p> <p>ITALY</p> <p><b>Rural address – Variation 2:</b></p> <p>Title FirstName Surname [Addressee]</p> <p>FRAZIONE MASSIGNANO SNC [Village, no premise number]</p> <p>60129 MOSSO BI [Postcode + locality + province code]</p> <p>ITALY</p> <p><b>Rural address – Variation 3:</b></p> <p>Title FirstName Surname [Addressee]</p> <p>BORGATA CAPOMOSSO 17 [Village, premise number]</p> <p>13822 MOSSO BI [Postcode + locality + province code]</p> <p>ITALY</p> <p><b>Post Office Box address:</b></p> <p>Title FirstName Surname [Addressee]</p> <p>UFFICIO ROMA TRULLO UFFICIO + Post office location]</p> <p>CASELLA POSTALE 1234 [P.O. Box + box number]</p> <p>00149 ROMA RM [Postal code + city + province code]</p> <p>ITALY</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• Where no house number is provided: <ul style="list-style-type: none"> <li>○ SN means senzo numero/without a number</li> </ul> </li> </ul>
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	<ul style="list-style-type: none"> <li>○ SNC means senzo numero civico/without a house number</li> <li>○ Where a premise number is 'SN' or 'SNC', record the street name and then SN or SNC beside it, e.g. Via Gianbattista SN</li> </ul> <ul style="list-style-type: none"> <li>• Venice has its own system of house numbering, based on one of the six quarters (sestieri - Cannaregio, Castello, Dorsoduro, San Marco, San Polo and Santa Croce) rather than on the street name. An address might be San Marco 4687</li> </ul> <p><b>Same sex relationships</b> + Read more ...</p> <p>Italy has recognised same-sex civil unions (Italian: unione civile) since 5 June 2016.</p>
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### Australian payments

#### Rules for Australian payments

Category title	Description
<b>Australian payments</b>	<p><b>Payments covered under the Agreement</b> + Read more ...</p> <p>For Australia, the Agreement with Italy covers:</p> <ul style="list-style-type: none"> <li>• Age Pension</li> <li>• Disability Support Pension (DSP)</li> <li>• Carer Payment (CP)</li> <li>• Payment Parenting Single (PPS)</li> <li>• Double Orphan Pension (DOP)</li> </ul> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• Only severely disabled DSP customers may be granted under the Agreement (Article 1.1(f))</li> <li>• Carer Payment is limited to carer partners of Age/DSP customers only (Article 1.1(m))</li> <li>• Only a 'widowed person' maybe be granted PPS under the Agreement. 'Widowed person' means a</li> </ul>

	<p>female who ceases to be a member of a legally married (de jure) couple and who is not currently a member of a couple (Article 1.1(o))</p> <ul style="list-style-type: none"> <li>The <a href="#">DOP and Bereavement Smart Centre Processing Team</a> assess and code all DOP claims. <b>s47E(d)</b> For help, see <a href="#">Bereavement/Double Orphan Pension Helpdesk</a></li> <li>While BVA cannot be claimed after 20 March 2020, claims lodged prior to this date may still be received. See <a href="#">Bereavement Allowance (BVA)</a></li> </ul>
<p><b>Australian claims forms and processes</b></p>	<p>See <a href="#">Agreement Country Document Catalogue (ACDC)</a> for samples of forms, foreign documents and translations.</p> <p><b>In Australia</b> + Read more ...</p> <p><a href="#">Claims for Australian payments under International Agreements</a> use the same methods and processes as domestic claims.</p> <p><b>In Italy</b> + Read more ...</p> <p>Forms to claim an Australian payment in Italy can be obtained by:</p> <ul style="list-style-type: none"> <li>downloading the relevant form from the Services Australia website. See <a href="#">Resources</a></li> <li>contacting Centrelink International Services (CIS)</li> <li>contacting the <a href="#">Italian authorities</a></li> </ul> <p><b>Australian forms needed</b></p> <p>The customer is to complete and provide the following:</p> <p><b>All claims:</b></p> <ul style="list-style-type: none"> <li><b>AUS140IT</b> - Australian Pension Claim – Social Security Agreement between Australia and Italy</li> </ul> <p><b>DSP only:</b></p> <ul style="list-style-type: none"> <li><b>AUS142IT</b> - Work Capacity - Customer Information (Italy)</li> </ul>

	<ul style="list-style-type: none"> <li>• <b>AUS109</b> - Treating Doctor's Report - outside Australia</li> <li>• <b>AUS175</b> – Medical Assessment Report - Disability Support Pension (Outside Australia)</li> </ul> <p><b>Note:</b> Italy arranges for the AUS175 to be completed on a case-by-case basis.</p> <p><b>CP only:</b></p> <ul style="list-style-type: none"> <li>• <b>AUS156IT</b> - Assessment for Carer Payment (Italy)</li> <li>• <b>AUS156ITa</b> - Health Professional Assessment for Carer Payment (Italy)</li> </ul> <p>Forms can be lodged at any Italian social security office.</p> <p>Under Section 5 of the Administrative Arrangements, the Italian institutions will:</p> <ul style="list-style-type: none"> <li>• accept all forms/documents and date stamp the AUS140 form</li> <li>• verify the customer’s identity and personal details</li> <li>• when necessary, arrange medical forms to be completed, and</li> <li>• send the form(s) and any supporting documentation to Services Australia with a liaison form specifying periods of coverage in Italy and information regarding Italian pensions</li> </ul> <p>See <a href="#">Exchange of information and liaison forms</a>.</p>
<p><b>Lodgement rules and start day</b></p>	<p>All <a href="#">claims for Australian payments under International Agreements</a> are assessed by Centrelink International Services (CIS).</p> <p><b>Residence rules for claims</b> + Read more ...</p> <p>If a person is not an <a href="#">Australian resident</a> and in Australia on the date the claim is made, they may use the Agreement to meet the residence rules for claims if, on that date, they are:</p>

	<ul style="list-style-type: none"> <li>• an <a href="#">Australian resident</a>, a resident of Italy or another third <a href="#">Agreement country that accepts claims for Australian pension under another agreement</a> (Article 5.1(a)), <b>and</b></li> <li>• physically present in Australia, Italy or that third country (Article 5.1(b))</li> </ul> <p><b>Note:</b> excludes Double Orphan Pension (Article 5.2) - a person must have been an Australian resident at some time (Article 5.1).</p> <p><b>Claim lodgement</b> + Read more ...</p> <p><b>Claims under the Italian Agreement</b></p> <p>Claims for Australian payment under the Italian Agreement may be lodged in certain other Australian Agreement countries.</p> <p>See the <a href="#">Claim lodgement matrix</a>.</p> <p><b>Accepting other Agreement claims</b></p> <p>Italy will accept claims for Australian benefits under other Australian social security agreements.</p> <p><b>Claim lodgement consideration</b></p> <p>The customer must also satisfy any other rules under the other agreement and other social security law provisions, including portability. For example, DSP can be claimed in a third country but has an ongoing residence requirement. Therefore, if the claimant is:</p> <ul style="list-style-type: none"> <li>• <b>living</b> in the other country, DSP cannot be paid</li> <li>• <b>temporarily</b> in the other country, DSP may generally be paid for the period it is portable under domestic legislation</li> </ul> <p><b>Date the claim is 'made' and start day</b> + Read more ...</p> <p>The normal rules for working out the date a claim is 'made' and start day apply to claims under the Agreement with Italy. However, the Agreement also allows:</p>
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	<ul style="list-style-type: none"> <li>the date of lodgement of a claim for an Australian payment in Italy to be used as the date of lodgement in Australia (Article 16.2)</li> </ul> <p>For coding help, see:</p> <ul style="list-style-type: none"> <li><a href="#">Claims for Australian payments under International Agreements</a>, and</li> <li><a href="#">Start Day (CLK)</a></li> </ul>
<p><b>Qualification/Totalisation</b></p>	<p><b>Totalisation of Qualifying Periods</b> + Read more ...</p> <p>The Agreement allows:</p> <ul style="list-style-type: none"> <li>totalisation of periods of qualifying Australian residence and periods of credited contributions in Italy to meet any minimum periods to qualify for an Australian pension, for example, 10 years for Age Pension (Article 7.1)</li> <li>the total of any non-continuous periods of credited contributions in Italy to be considered to be continuous to meet any continuous residence requirements (Article 7.2)</li> </ul> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>Overlapping Australian residence and Italian periods of coverage are only counted once (Article 7.3)</li> <li>INPS administers payments previously made under the INPDAP scheme. INPDAP remains outside the scope of the Agreement and INPDAP contributions <b>cannot</b> be used for totalisation</li> <li>Adjoining periods of Australian qualifying residence and periods of credited contributions in Italy, with a break of up to 3 months in between, can also be considered to be continuous (Policy)</li> </ul> <p>See Resources in <a href="#">International Social Security Agreements</a> for examples of totalisation.</p> <p><b>Parenting Payment single (PPS)</b></p>

	<p>The Agreement also allows a woman to use their deceased husband's credited contributions to totalise for Parenting Payment Single (PPS) (Article 7.5).</p> <p><b>Italian periods of coverage</b> + Read more ...</p> <p>Italian period of coverage:</p> <ul style="list-style-type: none"><li>• means a period of credited contributions, for instance, a period during which contributions were paid by employers and employees, or any equivalent period, defined as such in the Italian legislation</li><li>• where equivalent periods may include deemed periods, such as for child rearing or military service</li><li>• where both actual and deemed periods may be used when totalising for Australian qualification purposes, as long as they are certified and don't overlap</li><li>• must be certified by the Italian Competent Institution</li></ul> <p><b>Note:</b></p> <ul style="list-style-type: none"><li>• INPDAP contributions <b>cannot</b> be used to totalisation purposes</li><li>• European arrangements may allow insurance in one country to be included in assessment for pensions from other European countries. In some cases, the other country may pay the whole pension</li></ul> <p><b>Minimum Working Life Residence (WLR) to totalise</b> + Read more ...</p> <p>To be able to use the totalisation provisions, a person who is outside Australia at the date of lodgement must have at least 12 months Australian <a href="#">Working Life Residence (WLR)</a> in Australia of which 6 months must be continuous (Article 7.4(a)).</p>
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	<p><b>Note:</b> unlike WLR for rate, this period cannot be rounded.</p> <p>No minimum WLR is required if the person is an <a href="#">Australian resident</a> in Australia at the date of lodgement (Article 7.4(b)).</p> <p><b>Carer Payment (CP)</b> + Read more ...</p> <p>CP has no qualifying residence periods but does have a Newly Arrived Resident's Waiting Period (NARWP). Beside normal exemptions, a NARWP only applies to a person who has 'entered Australia'. See: <a href="#">Newly Arrived Resident's Waiting Period (NARWP) and Qualifying Residence Period</a>.</p> <p>A person who is resident and present outside Australia has not entered Australia and therefore does not have a NARWP.</p> <p>To avoid granting CP to a person who has never been to Australia, the Agreement requires a person to have been an <a href="#">Australian resident</a> at some time (Article 5.1).</p> <p><b>Ongoing residence requirements</b> + Read more ...</p> <p>The Agreement allows the ongoing residence requirement for DSP, PPS and CP to be met by customers who reside in Italy (Article 18.1).</p>
<p><b>Rate calculation</b></p>	<p>The rate of payment may be affected by the <a href="#">Agreement with New Zealand</a>.</p> <p><b>Outside Australia:</b> + Read more ...</p> <p>For customers outside Australia, the Agreement with Italy (Article 8.1) refers to the overall rate calculation contained in section 12(1) of the Social Security (International Agreements) Act 1999.</p> <p>This means customers paid under the Agreement have:</p> <ul style="list-style-type: none"> <li>• a proportional rate paid according to their Australian <a href="#">Working Life Residence (WLR)</a></li> <li>• the <a href="#">Rate Limiter/Limited Rate</a> applied, and</li> </ul>

- [additional child amounts](#) (s14A, SS(IA)A 1999) included, if eligible
- their Italian pension proportionalised ([Randisi concession](#)) for use in the income test using denominator of 300 (Article 8.1c)

**Note:**

- In some circumstances their partner's WLR may be used. See [Working Life Residence \(WLR\)](#)
- **Autonomous customers** who are paid a proportional rate and receiving an Italian pension will also have the Randisi concession applied to their Italian pension (Article 7.2)
- This does not apply to Double Orphan Pension (DOP) (Article 8.1)

**Non-proportional rate extension**

Customers paid under the Agreement and temporarily outside Australia, cannot have their non-proportional portability rate extended if they are unable to return to Australia.

**Returns to Australia**

The [inside Australia rate](#) applies immediately if the customer returns to [reside in Australia](#). The outside Australia rate continues to apply indefinitely for any temporary return.

**Inside Australia:** + Read more ...

Unlike other agreements, the Agreement with Italy states that only customers who are an Australian resident and in Australia under the Agreement are paid a [direct deduction](#) rate (Article 8.3). However, policy advice is that the inside Australia [direct deduction](#) rate also applies to customers who are [residing in Australia](#) even if they do not have the legal status to be an Australian resident

The Agreement does **not** include a [comparison rate](#) in Australia.

	<p><b>Departures from Australia</b></p> <p>There is no temporary departure provision in the Agreement. The outside Australia rate applies immediately on departure regardless of the length of the absence.</p>
<p><b>Portability</b></p>	<p><b>Portability</b> + Read more ...</p> <p><b>Portability under the Agreement</b></p> <p>Under the Agreement, provided the customer remains qualified, Australian payments are payable indefinitely in both countries, that is, for temporary or permanent absences (Article 18.1).</p> <p><b>Third country portability under the Agreement</b></p> <p>Portability to third countries for a customer paid under the Agreement is the same as for an autonomous customer leaving Australia (Article 18.2). See <a href="#">Portability of payments</a>.</p>
<p><b>Transfers to/from Agreement</b></p>	<p><b>Transfers to the Italian Agreement</b> + Read more ...</p> <p>If necessary, a customer who receives an autonomous payment covered by the Agreement may be able to transfer to the Agreement if they are in Italy when their normal portability period expires. The <a href="#">portability</a> under the Agreement then applies.</p> <p><b>Note:</b> the customer must meet the transfer requirements and satisfy any payment specific requirements under the Agreement, for example, being severely disabled for DSP. This means that non-severely disabled customers cannot transfer to the Agreement to extend portability to Italy.</p> <p>Once a customer transfers to the Agreement they are then considered to be paid by virtue of the Agreement and all provisions of the agreement apply, including the <a href="#">rate of payment</a>.</p> <p>See <a href="#">Transfers to international social security agreements</a>.</p> <p><b>Transfers to autonomous</b> + Read more ...</p>

	<p>A person who would be autonomously qualified but is paid under the Agreement can transfer from the Agreement to autonomous if they are an <a href="#">Australian resident</a> and in Australia.</p> <p>On return to Australia, system processing will automatically transfer from the Agreement to autonomous <b>only</b> if the person is an <a href="#">Australian resident</a> who has only used the Agreement to extend their portability while outside Australia.</p> <p><a href="#">Former resident provisions</a> may affect customers who transfer to autonomous if they leave Australia again within 2 years of becoming an Australian resident.</p>
<p><b>Paying customers in Italy</b></p>	<p><b>Australian payments to overseas bank account</b> + Read more ...</p> <p>Australian payments may be issued to customers outside of Australia. If the customer intends to be outside of Australia:</p> <ul style="list-style-type: none"> <li>• long-term (12 months or longer), their Australian payment may be issued to an overseas bank account. See <a href="#">Overseas Bank Account Details (OBAD)</a> for payment requirements by country</li> <li>• for less than 12 months, payment will generally continue to their normal Australian bank account every 2 weeks</li> </ul> <p>See <a href="#">Delivery of payments to Centrelink customers outside Australia</a>.</p>

### Italian payments

#### Rules for Italian payments

Category title	Description
<p><b>Italian payments</b></p>	<p><b>Payments covered under the Agreement</b> + Read more ...</p> <p>For Italy, the Agreement covers the 'concerning the compulsory general insurance scheme for employees in regard to invalidity, old age and survivors; special insurance</p>

schemes for self-employed persons and other categories of workers; family benefits for dependants of pensioners and unemployment insurance'.

#### **Main payments**

- **Pensioni di Vecchiaia** - Old Age Pension (**AGE**)  
Includes:
  - **Anzianità** (Seniority pension)
  - **Pensione anticipate** (Anticipated pension)
- **Pensioni di Invalidità** - Invalidation Pensions (**INV**)  
Includes:
  - **Assegni di invalidità** (Invalidity allowance)
  - **Pensioni di inabilità** (Inability pension)
  - **Pensioni di inabilità privilegiata** (Privileged inability pension)
  - **Assegni per l'assistenza personale al pensionato per inabilità** (Invalidity attendance allowance/inability pension)
- **Pensioni ai Superstiti/ Reversibilità** - Survivor Pension (**SUR**)
- **L'indennità di disoccupazione** (Unemployment allowance) (**UMB**)

#### **Supplementary payments/Allowances**

Italian supplementary or social assistance payments:

- **Assegno sociale** (Social benefit) – formerly Social pension (**SOC**)
- **Integrazione al minimo/Importo differenziale** (Integration supplement)- Integration amount
- **Maggiorazione Sociale** (Social allowance/supplement)
- **Assegni Familiari** (Family benefits for dependents)

	<ul style="list-style-type: none"> <li>○ <b>Assegno per il nucleo familiare a favore del coniuge</b> (Spouse)</li> <li>○ <b>Assegno per il nucleo familiare a favore dei figli</b> (Child/ren)</li> </ul> <p><b>Other known payments</b> + Read more ...</p> <p>The following known payments are paid by the Italian authorities but are not covered under the Agreement:</p> <ul style="list-style-type: none"> <li>• <b>Pensione degli Invalidi Civili (INVCIV)</b> (Civil Invalidity scheme) - includes: <ul style="list-style-type: none"> <li>○ <b>Indennità di Accompagnamento/Assegno di Accompagnamento</b> (Invalidity attendance allowance) (CAR)</li> </ul> </li> <li>• <b>INPDAP</b> (Civil servants' pension scheme) <ul style="list-style-type: none"> <li>○ <b>Indennità Integrativa Speciale</b> (Special supplement allowance)</li> </ul> </li> <li>• <b>INAIL</b> (Compensation payments)</li> <li>• <b>Pensioni di guerra</b> (War pension)</li> <li>• <b>Indennità di mobilità</b> (Redundancy payment)</li> <li>• <b>Restitution payments</b></li> <li>• <b>Quattordisecima</b></li> </ul> <p><b>For help with:</b></p> <ul style="list-style-type: none"> <li>• <b>Assessment</b> of Italian pensions, see <a href="#">Assessment</a></li> <li>• <b>Coding</b> of Italian pensions, see <a href="#">Eligibility and Coding</a></li> </ul>
<p><b>Comparable Foreign Payment (CFP)</b></p>	<p><b>Requirement to claim CFP</b> + Read more ...</p> <p>The requirement to claim a pension applies to Italian AGE and INV.</p> <ul style="list-style-type: none"> <li>• Customers may voluntarily claim SUR.</li> </ul> <p>See <a href="#">Foreign pension claims</a>.</p> <p><b>Eligibility for Italian payments</b> + Read more ...</p>

	<p><a href="#">Eligibility and coding of foreign pensions</a> tab contains detailed information on Italian payments that are subject to CFP legislation.</p>
<p><b>Italian claim forms and processes</b></p>	<p>See <a href="#">Agreement Country Document Catalogue (ACDC)</a> for samples of forms, foreign documents and translations.</p> <p><b>In Australia</b> + Read more ...</p> <p><a href="#">Italian Patronati</a> are set up to assist customers to claim and maintain a pension and are experienced in the complex requirements. Customers should be encouraged to lodge Italian pension claims through a Patronato office.</p> <p>Claim packs are available for AGE, INV and SUR.</p> <p><b>Note:</b> customers may also claim Italian Family Benefits (Assegni Familiari) separately using the Mod IC form in the claim pack.</p> <p>Claim packs are issued through the <b>s47E(d)</b> See <a href="#">Assisting customers to claim a foreign pension</a>.</p> <p><b>Specific requirements for Italian claims</b></p> <p>The customer is to complete and provide the following:</p> <p><b>All claims:</b></p> <ul style="list-style-type: none"> <li>• Domanda Di Prestazione Liquidata In Regime Di Convenzione Di Sicurezza Sociale Italo-Australiana IT/AUS1 - Application for Benefits under the Italy-Australia Social Security Agreement</li> <li>• Various forms</li> </ul> <p><b>SUR only:</b></p> <ul style="list-style-type: none"> <li>• Marriage Certificate</li> <li>• Death Certificate or Decree Nisi</li> </ul> <p><b>Requests for additional information</b></p> <p>If information provided with the claim for Italian pension is incomplete, Italy will send requests for information in Italian direct to customers.</p>

**Employment periods** + Read more ...

Under the Agreement with Italy (Article 14), Italy may request confirmation of employment periods in Australia for the purpose of Italian unemployment allowance via their Certificate relative to periods of work in Australia for the granting of unemployment benefits in Italy (IT/AUS4) form.

Periods of self-employment **cannot** be counted.

See [Italian IT/AUS4 form](#).

**Receipt of foreign pension claim by Services Australia** + Read more ...

Under the Administrative Arrangements, Italian forms can be lodged in Australia at any service centre. See [Processing a foreign pension claim](#).

- **All** foreign pension claims and supporting documents **must be scanned**, and
- The original foreign claim form and (copies of) supporting documentation **must be sent in paper form** to Centrelink International Services (CIS).  
See [Processing a foreign pension claim](#)

**Centrelink International Services (CIS) only:**

CIS will complete the following or arrange to be completed as necessary and attach the documents to the foreign pension claim to send to the agreement country. See [Agreement Liaison Detail \(ALD\)](#) for method of transmission.

**All claims:**

- **AUS187IT** - Australia/Italy Agreement on Social Security

**Note:** the AUS208 form has been decommissioned. This form should no longer be used.

For help with creating and completing the liaison form, see [Agreement liaisons, NZ CICs and exchange of information](#).

**INV only:**

	<ul style="list-style-type: none"> <li>• <b>E213</b> - Detailed Medical Report. See <a href="#">Foreign pension medical assessments</a></li> </ul> <p>Where Italian Family Benefits (Assegni Familiari) is being claimed as part of an Italian invalidity pension claim, the Authority to release medical information (also known as Attachment IC) form in the Italian claim pack may be used.</p> <p><b>In Italy:</b> + Read more ...</p> <p>Enquiries regarding claims for Italian payments in Italy or a third country should be directed to the <a href="#">Italian social security authorities</a>.</p>
<p><b>Payment method and Indexation (CPI)</b></p>	<p><b>Payment Method</b> + Read more ...</p> <p>Italian pensions are paid through Citibank. Italian payments may be made by direct deposit in Australia.</p> <p>Any queries about the non-payment of Italian pension should be directed to <a href="#">Italian Patronati</a> or <a href="#">Citibank</a> directly.</p> <p><b>Frequency</b> + Read more ...</p> <p>Agreement pensions (<b>AGE/INV/SUR</b>) are paid as 12 regular monthly payments and a bonus payment in December, meaning the monthly amount must be multiplied by 13.</p> <p>Family Allowance (Assegni Familiari) is paid as 12 regular monthly payments with no bonus payment.</p> <p><b>SOC/UMB/CAR</b> are paid as 12 regular monthly payments with no bonus payment, meaning the monthly amount must be multiplied by 12.</p> <p>Other benefits or private pensions are paid monthly or annually.</p> <p><b>Currency</b> + Read more ...</p> <p>Italian pensions must be recorded in the source currency - Euro (<b>EUR</b>). Official statements provide the foreign currency amounts.</p> <p>Amounts recorded in source currency on the <b>s47E(d)</b> must <b>not</b> be changed to the Australian dollar amount.</p>

	<p><b>Note:</b> payments into Australia are made in Australian dollars.</p> <p><b>Indexation (CPI) + Read more ...</b></p> <p>Italian pensions are generally increased for Consumer Price Index (CPI, or cost of living) changes in January each year.</p> <p>Customers are only notified in March/April.</p> <p>For information on bulk data exchanges and auto adjusted CPI increases, see <a href="#">International Data Exchange Program and auto-indexation of foreign pensions</a>.</p>
<p><b>Assessment</b></p>	<p>The assessment and coding of Italian pensions may be affected by the <a href="#">Agreement with New Zealand</a>.</p> <p><b>Agreement pensions (AGE/INV/SUR/UMB) are generally:</b> + Read more ...</p> <ul style="list-style-type: none"> <li>• <a href="#">directly deducted</a> (Article 8.3) and ignored in the income test (Article 8(8)(zc) Social Security Act 1991) for customers under the Italian Agreement who are in Australia</li> <li>• proportionalised and assessed as ordinary income (Article 8.1) for customers paid: <ul style="list-style-type: none"> <li>○ under the Italian agreement who are outside Australia</li> <li>○ autonomously who are on a long-term outside Australia rate</li> </ul> </li> <li>• ordinary income (not proportionalised) for customers paid: <ul style="list-style-type: none"> <li>○ autonomously who are inside Australia</li> <li>○ under another agreement other than Italy or <a href="#">New Zealand</a> who are inside or outside Australia</li> </ul> </li> </ul> <p>See <a href="#">Rate Calculation</a> for when a direct deduction or proportional rate is applied.</p> <p><b>Note:</b></p>

- This does not apply to Double Orphan Pension (DOP) (Articles 8.1 and 8.3). DOP is a non-mean tested payment
- Each member of a couple is deemed to receive half of the total amount received by the couple (Article 8.4)
- Advice from INPS is Veteran's allowance (Maggiorazione per gli ex-combattenti) is no longer paid

**The following payments are assessed as ordinary income:** + Read more ...

- **INAIL** - Compensation payments

INAIL (Istituto Nazionale Assicurazione contro gli Infortuni sul Lavoro) is a public organisation that manages compulsory insurance against accidents at work and professional diseases. Payments are paid monthly (no bonus payment).

Payments are treated as workers compensation.

See [Treatment of compensation payments](#).

- **INPDAP** - Civil Servants pension scheme

The administration of the pensions for civil servants and of benefits for employees of the local authorities falls within the responsibility of the National Welfare Institute for Employees of Public Authorities (Istituto Nazionale di Previdenza per i Dipendenti dell'Amministrazione Pubblica) also known as INPDAP.

Indennità Integrativa Speciale (Special supplement allowance) can be paid in addition to INPDAP pensions.

INPDAP pension is paid as 12 regular monthly (contributive) payments and a bonus payment, meaning the monthly amount must be multiplied by 13. If paid with family allowance, then multiply allowance by 12 and add to contributive total.

**Note:** the Indennità Integrativa Speciale when payable is a x13 monthly component, however the 13th monthly payment is always 20 EUR less. Therefore, multiply the monthly amount

x13 and subtract 20 EUR for the annual total to be added to the contributive total.

- **Pensioni di Guerra** - War pension

War pension (Pensioni di Guerra) is a compensatory benefit paid to people who have suffered impairments resulting from war events, or whose spouse or parent died because of the war.

- **Indennità di Mobilità** - Redundancy payment

An income support payment to employed workers who have involuntarily lost their job or fixed term contract has expired.

Payments are paid monthly (no bonus payment).

**The following payments are exempt:** + Read more ...

These payments are exempt income for customers paid under the Agreement and autonomously:

- **Assegno sociale** - Non-contributory social benefit

Social benefit (Assegno sociale) replaced the Pensione Social (Social Pension) in 1996. It is a welfare benefit provided for all those who have never worked during their lives and therefore have never paid social security contributions.

This payment is exempt from the income test for customers outside Australia (Article 8.1(a) and (b)). Otherwise, it is assessed the same as the main agreement pension.

**Integrazione al minimo/Importo differenziale** - Integration supplement and **Maggiorazione sociale** - Social allowance/supplement

These supplements assist those customers in receipt of an Italian pension who do not receive the minimum amount of Italian pension. These payments are exempt from the income test for customers paid under the agreement who are outside Australia or autonomous customers who are inside or outside Australia.

For Integration supplement, Italian law guarantees a minimum rate of pension. If a person has not made sufficient

	<p>contributions to be entitled to that minimum level, a top up payment is paid to make up the difference.</p> <ul style="list-style-type: none"> <li>• These cases are identified on Italian NOGs by the term 'contitolare' (split cases) or Legge (Law) 335/95 Art 1 c41 or Art 1 c43 on a Notice of Grant (NOG) or 'reddito incumulabile' on Mod O bis M</li> <li>• For this clause, Australian benefits also include other income support payments, for example JobSeeker Payment (JSP) or Sickness Allowance (SA) (Article 10.2)</li> </ul> <p>The Integration supplement is 12 regular monthly payments and a bonus payment in December, meaning the monthly amount must be multiplied by 13</p> <p>The Social allowance is paid once a year in July.</p> <ul style="list-style-type: none"> <li>• <b>Assegni familiari</b> - Family benefit</li> </ul> <p>Family benefit (Assegni familiari) covers the following payments:</p> <ul style="list-style-type: none"> <li>• Assegno per il nucleo familiare a favore dei figli (Child benefit family allowance)</li> <li>• Assegno per il nucleo familiare a favore del coniuge (Spousal family allowance)</li> </ul> <p>For customers paid:</p> <ul style="list-style-type: none"> <li>• under the agreement who are outside Australia, payment is exempt</li> <li>• under the agreement who are inside Australia, payment is assessed the same as the agreement pension (direct deduction)</li> <li>• autonomously who are inside or outside Australia, payment is exempt</li> <li>• <b>Quattordicesima</b> - 14th payment</li> </ul> <p>An additional payment, called the fourteenth payment (Quattordicesima) is a lump sum benefit made in addition to the extra July payment (the thirteenth payment or Tredicesima). The purpose of this payment is to help protect</p>
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the real value of medium-low Italian pensions. Customers can receive this payment from the age of 64 if their total personal income is under a certain income limit.

Quattordicesima is generally means tested by the Italian authorities. The amount may affect the rate of Australian pension which then will affect the rate of Italian payment causing a see-saw effect with payments.

It is exempt from the income test in all circumstances.

- **Indennità di Accompagnamento /Assegno di Accompagnamento** - INVCIV Invalidation Attendance Allowance

An allowance that is paid monthly to help disabled customers.

Invalidation Attendance Allowance is part of the Civil Invalidation scheme (Pensione degli Invalidi Civili (INVCIV)).

Payment is exempt from the income test from 2 September 1997 (s8)(8)(zi) by Ministerial Determination under s35a Social Security Act 1991) and ordinary income prior to that date.

- **Restitution payments**

Restitution payments:

- may be paid as compensation for internment or persecution during wartime
- paid for National Socialist (Nazi) persecution are assessed as exempt income (s8)(8)(n) Social Security Act 1991). **Otherwise**, payment is assessed as [ordinary income](#)

Known Italian restitution payment:

- Assegni vitalizi agli internati nei campi di sterminio K.Z

**Coding - Special notes** + Read more ...

### **Discrepancy - Italian pension and components**

In some cases, the total Italian pension amount advised on a notice may be less than the sum of the components. The reason for this may be that:

	<ul style="list-style-type: none"> <li>• pensions may be split between customers, for example, survivor pension for disabled adult siblings, or</li> <li>• the advice may be of a notional entitlement before a reduction due to income</li> </ul> <p>The total (lower) amount is to be assessed against the customer. For split pensions, Service Officers should check to see if the other recipient is also a customer and code accordingly.</p> <p>These cases are identified on Italian Notices of Grant (NOG) by the term 'contitolare' (split cases) or Legge 335/95 Art 1 c41 or Art 1 c43 on a Notice of Grant (NOG) or 'reddito incumulabile'on Mod O bis M.</p> <p><b>As47E(d)</b> is required for split pension cases.</p>
<p><b>Arrears debts and embargo</b></p>	<p>The assessment and coding of Italian pensions may be affected by the <a href="#">Agreement with New Zealand</a>.</p> <p><b>Arrears debts and embargo</b> + Read more ...</p> <p>The Agreement includes embargo provisions (Article 17.5) but they are not used.</p> <p>Arrears debts for customers and partners are raised under s1228A Social Security Act 1991 and recovered by normal methods under the Act. See <a href="#">Comparable foreign payment lump sum arrears debts</a>.</p> <p>A contravention debt may also occur if the customer does not advise of the grant of their Italian pension within their notification period. See <a href="#">Foreign pension coding</a>.</p> <p><b>Embargo of Australian arrears request</b> + Read more ...</p> <p>Where Italy is paying income tested benefits in Italy and Australia grants a payment, Italy will recalculate their rate in accordance with the Agreement. This may result in a slight reduction in rate applied retrospectively. Italy may request an embargo of the arrears of Australian pension to recover any debt.</p>

	<p>However, as this request is post-grant, these provisions of the Agreement <b>cannot</b> be applied.</p>
<p><b>Life certificates, notices and documents</b></p>	<p>See <a href="#">Agreement Country Document Catalogue (ACDC)</a> for samples of forms, foreign documents and translations.</p> <p><b>Life certificates</b> + Read more ...</p> <p>Life certificates (certificato di esistenza in vita) are issued annually by Citibank, not the Italian pension authorities.</p> <p>Italian life certificates are yellow (or a green form if the customer has a Power of Attorney or is in a nursing home) and should be completed in black pen.</p> <p><b>Italian Life Certificates can be certified by an officer of Services Australia.</b></p> <p>Services Australia is not able to help customers with sending life certificates overseas.</p> <p>Customers <b>must</b> return their original Life Certificate (yellow or green form) <b>directly to Citibank</b> or payments will be suspended. See the <a href="#">Resources</a> page for contact details for Citibank.</p> <p>For information on helping customers with life certificates, see <a href="#">Assisting customers to maintain a foreign pension</a>.</p> <p><b>Notices and documents</b> + Read more ...</p> <p>Customers in Australia are sent notices at grant and for changes of rate, for example, each year for indexation.</p> <p>In some cases, the total Italian pension amount advised on a notice is less than the sum of the components. The reason for this may be that</p> <ul style="list-style-type: none"> <li>• pensions may be split between customers, for example, survivor pension for disabled adult siblings or</li> <li>• the advice may be of a notional entitlement before a reduction due to income</li> </ul> <p>The total (lower) amount is to be assessed against the customer. For split pensions, Service Officers should check to</p>

	<p>see if the other recipient is also a customer and code accordingly.</p> <p>These cases are identified on Italian NOGs by the term 'contitolare' (split cases) or Legge 335/95 Art 1 c41 or Art 1 c43 on a Notice of Grant (NOG) or 'reddito incumulabile' on Mod O bis M.</p> <p>A <b>s47E(d)</b> is needed for split pension cases.</p> <p><b>Repayment of Italian pensions after death</b></p> <p>Relatives of deceased customers previously in receipt of an Italian pension may be asked by the Italian authorities to repay money after the death of an Italian pensioner. Direct them to contact INPS to make suitable arrangements.</p> <p>Contact details for foreign pension authorities are available in the <b>s47E(d)</b></p> <p><b>Italian Pension Certificate Mod O bis M</b></p> <p>The Mod O bis M is sent to all Italian pensioners at the beginning of the new calendar year or available online. The certificate:</p> <ul style="list-style-type: none"> <li>• advises new monthly amount of pension but does not specify exempt component (import differenziale)</li> <li>• provides the Italian pension type and Pension number</li> </ul> <p>See <a href="#">Assessment</a>.</p> <p><b>Article 10 letters</b></p> <p>Article 10 letters are sent to Italian pensioners in Australia each year. The letter:</p> <ul style="list-style-type: none"> <li>• specifies the new annual total pension and individual components</li> <li>• provides the Italian pension type and Pension number</li> </ul> <p>See: <a href="#">Article 10 Letters</a></p> <p><b>Mod Red Campaign requests</b></p>
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	<p>Mod Red is sent to all Italian pensioners requesting updated information on income from all sources, including Australian pension. See <a href="#">Mod Red Campaign</a>.</p> <p><b>Mod14/Est</b></p> <p>Mod14/Est may be sent to customers if the Italian pension is adjusted, e.g. due to Mod Red. This notice does not provide sufficient information to code Italian pensions.</p> <p><b>Mod CUD</b></p> <p>Mod CUD is an Italian Payment Summary for tax purposes. This notice does not provide sufficient information to code Italian pensions; however, it provides the Code Fiscale. See <a href="#">Assessment</a>.</p>
<p><b>Article 10 letters</b></p>	<p>Samples of forms, foreign documents and translations are available in the <a href="#">Residence and International program homepage</a>.</p> <p><b>Article 10 letters</b> + Read more ...</p> <p>Article 10 of the Agreement (Article 17 of the original Agreement) specifies that parts of Italian pensions are exempt from the income test. See <a href="#">Exempt payments</a>.</p> <p>So that the relevant components can be identified, the Italian pension authorities issue an Article 10 Letter to customers in Australia each year.</p> <p>Article 10 Letters should be scanned to the customer record. Coding of Article 10 letters are to be done by CIS only.</p> <p><b>s47E(d)</b></p> <p><b>Note:</b> some notices may still indicate the old Article 17</p> <p><b>Coding of Article 10 letters</b> + Read more ...</p> <p><b>Note:</b> Article 10 letters are to be coded by CIS only.</p> <p><b>s47E(d)</b></p>

	<p><b>Note:</b> in some cases, the total Italian pension amount advised on a notice is less than the sum of the components. The reason for this may be that:</p> <ul style="list-style-type: none"> <li>• pensions may be split between customers, for example, survivor pension for disabled adult siblings or</li> <li>• the advice may be of a notional entitlement before a reduction due to income</li> </ul> <p>The total (lower) amount is to be assessed against the customer. For split pensions, Service Officers should check to see if the other recipient is also a customer and code accordingly.</p> <p>These cases are identified on Italian Notices of Grant (NOG) by the term 'contitolare' (split cases) or Legge 335/95 Art 1 c41 or Art 1 c43 on a Notice of Grant (NOG) or 'reddito incumulabile' on Mod O bis M.</p> <p><b>As47E(d)</b> is required for split pension cases.</p>
<p><b>Mod Red Campaign</b></p>	<p>Samples of forms, foreign documents and translations are available in the <a href="#">Residence and International program homepage</a>.</p> <p><b>Mod Red Campaign</b> + Read more ...</p> <p>As Italian pensions are income tested, the Italian pension authority regularly requires pensioners to provide details of their income from all sources, including Australian payments.</p> <p>This is referred to as the Mod Red Campaign (after the letter issued) and usually commences in March/April each year.</p> <p>Customers are required to provide their income details for the previous calendar year (for example, a 2011 Mod Red request refers to the customer's income from January 2010 to December 2010).</p> <p><b>Action required</b></p> <p>For individual requests from customers or <a href="#">Italian Patronati</a>:</p>

	<ul style="list-style-type: none"> <li>• <b>s47E(d)</b></li> </ul> <p><b>Note:</b> a Mod14/Est notice may be sent to customers if the Italian pension is adjusted due to Mod Red. This notice does not provide sufficient information to code Italian pensions.</p>
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### Eligibility and coding of foreign pensions

#### Eligibility criteria for Pensione di Vecchiaia - Old Age Pension (AGE)

Table 1

Category title	Description
Claim limitations	Italy or Australia  <b>Note:</b> may be paid in other EU countries or a country with which Italy has a social security agreement.
Age	67 years
Qualifying periods	Domestic minimum: 20 years (240 months) Italian periods of coverage  <b>or</b>  Agreement totalisation: minimum of 12 months Italian periods of coverage, which can be totalised with Australian Working Life Residence (WLR) to meet the domestic minimum above.
Expiry	Death of pensioner.
Compatibility	Can receive at the same time as Survivors pension (SUR).  Cannot receive with Invalidity pension (INV).

#### Eligibility criteria for Pensione di Invalidità - Invalidity Pensions (INV)

Table 2

Category title	Description
Claim limitations	Italy or Australia.

	<b>Note:</b> may be paid in other EU countries or a country with which Italy has a social security agreement.
Age	N/A
Qualifying periods	Domestic minimum: 5 years (60 months) Italian periods of coverage. <b>Note:</b> 3 years of contributions immediately prior to application.  <b>or</b> Agreement totalisation: minimum of 12 months Italian periods of coverage, which can be totalised with Australian Working Life Residence (WLR) to meet the domestic minimum above.
Expiry	Automatically transferred to Old-age pension when qualified.
Compatibility	Can receive at the same time as Survivors Pension (SUR).  Cannot receive with AGE.

**Eligibility criteria for Pensione ai Superstiti - Survivors Pension (SUR)**

Table 3

<b>Category title</b>	<b>Description</b>
Claim limitations	Italy or Australia  <b>Note:</b> may be paid in other EU countries or a country with which Italy has a social security agreement.
Age	N/A
Qualifying periods	Domestic minimum: <ul style="list-style-type: none"> <li>• Widow</li> <li>• Widower (if disabled)</li> <li>• Divorcee</li> <li>• If deceased received IT AGE or would have qualified</li> </ul>

	<p><b>or</b></p> <p>Agreement totalisation: minimum of 12 months Italian periods of coverage, which can be totalised with Australian Working Life Residence (WLR) to meet the domestic minimum above.</p> <p><b>Note:</b> WLR of deceased pensioner or contributor.</p> <p><b>Pensioni ai Superstiti</b> is granted if the deceased contributor had 15 years of contributions, or at least 3 years of contributions in the last 5 years before grant.</p> <p><b>Reversibilit�</b> is awarded if the death of the contributor occurs immediately following the grant of an Italian AGE or INV pension</p>
Expiry	If remarries.
Compatibility	Can receive at the same time as AGE or INV.

#### Agreement pension coding

Table 4: This table contains coding of Italian Agreement pensions on the [s47E\(d\)](#)

[s47E\(d\)](#)

s47E(d)

s47E(d)

**Other payment coding**

Table 5: This table contains coding details of other Italian payments on the s47E(d)

s47E(d)

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**Restitution payment coding**

Table 6: This table contains coding details of Italian Restitution payments on the s47E(d)

s47E(d)

s47E(d)

s47E(d)

## References

### Policy

[Social Security Guide 10.4 Agreement with Italy](#)

[Social Security Guide 10.1 General Principles of Agreements](#)

[Social Security Guide 10.4.8.60 Exempt Payments - Agreement with Italy](#)

### Legislation

Links to the Federal Register of Legislation site go to a 'Series' page. Select the 'Latest' version.

[Social Security \(International Agreements\) Act 1999 Schedule 2, Italy](#)

[Social Security Act 1991](#)

- section 8, Income test definitions
  - subsection 8, 'Excluded amounts - general' and then 'a payment made to the person' (paragraph j)

## Resources

### Contact details

[Centrelink International Services \(CIS\) - contact details for staff](#)

[Centrelink International Services \(CIS\) - contact details for customers](#)

[Australian Taxation Office \(ATO\)](#)

### Citibank and Patronato contact information

This table describes the contact details for Citibank and Patronato.

Organisation	Contact details
<b>Citibank</b>	Phone: 1800 016 798 (free call, inside Australia) or Email: inps.pensionati@citi.com Postal address for the return of Life Certificates: PO Box 69957 London E14 1NJ United Kingdom
<b>Patronato</b>	s47E(d)

**Intranet links**

[Residence and International program](#)

[Centrelink International Services \(CIS\)](#)

**Services Australia website**

[Services Australia](#)

[Medicare phone numbers](#)