



# Social Security Agreement between Australia and the United States of America (USA)

## Australia's social security system

Australia's social security system is different to most other developed countries. Each person's pension is paid by the Australian Government out of general funds, rather than through contributions paid by individuals and employers into a social insurance fund. For this reason, Australian pensions are income and asset tested.

Services Australia delivers Australian social security payments to individuals.

You'll have to tell us about all of your, and in some instances, your partner's<sup>1</sup> income and assets if you want to claim an Australian pension.

## How does the agreement help you?

The agreement generally allows you to lodge a claim for payment from either country. It also allows you to add together your periods of residence in Australia and periods of social security coverage in the USA, so you can meet the minimum requirements for payment.

## Who can get an Australian payment?

If you live in Australia, the USA or another specified agreement country<sup>5</sup>, you can lodge a claim for the Australian Age Pension, Disability Support Pension, Carer Payment and Parenting Payment in any of those countries.

To qualify under the agreement, you need to meet the following basic requirements\*:

### Age Pension

You may be able to get Age Pension if:

- you're over the qualifying age (refer to [servicessaustralia.gov.au](https://servicessaustralia.gov.au) for details), and
- the total period of time you've lived in Australia and/or your periods of coverage in the USA add up to more than 10 years.

### Disability Support Pension

You may be able to get Disability Support Pension if:

- you have a disability, or
- you're permanently blind, and
- your disability/blindness occurred while you were living in Australia, or
- the total period of time you've lived in Australia and/or your periods of coverage in the USA add up to more than 10 years.

### Carer Payment

You may be able to get Carer Payment if:

- you're providing full-time care for someone, and

- you've lived in Australia before.

## Parenting Payment

You may be able to get Parenting Payment if:

- your partner is deceased, and
- you're caring for one or more children under 8 years of age who've been to Australia before, and
- the total period of time you have lived in Australia and/or your periods of coverage in the USA add up to more than 2 years.

**Note:** if you live outside Australia when you claim, you generally need at least 12 months Australian Working Life Residence<sup>2</sup>, of which 6 months must be continuous.

\* There may be additional requirements you need to meet before you can be paid.

## Who can get a US payment?

Under the agreement, you can add periods of Australian Working Life Residence<sup>2</sup> to your periods of coverage in the USA to meet the minimum requirement for the US Retirement Pension, Disability Pension and Survivor's Pension.

The US pension authorities make all decisions about US payments. For more information about US payments, you should contact the US pension authorities<sup>3</sup>.

## How do I claim?

If you're in Australia, to claim:

- an Australian payment under the agreement, got to **servicesaustralia.gov.au**
- a US payment, contact the agency<sup>4</sup>, or
- lodge your claim at your nearest Services Australia Service Centre.
- If you're in the USA, to claim:
  - a US payment, contact your local US social insurance office<sup>3</sup>.
  - an Australian payment:
    - contact your local US social insurance office
    - the agency, or
    - download the claim forms from **servicesaustralia.gov.au** You can also lodge your claim at any local US social insurance office.

If you're in another specified agreement country<sup>5</sup>, to claim:

- an Australian payment contact the agency, or
- download the claim forms from **servicesaustralia.gov.au**

You can also lodge your claim at any local social insurance office in that third country.

To get a claim for a US payment, contact the US social insurance office. You'll need to lodge your claim for a US payment directly with the US social insurance office.

Claims for Australian payments can be lodged up to 13 weeks early. You must lodge your claim and all supporting documents at the same time. If you don't do this your claim may not be

accepted. The only exceptions will be if you're waiting for medical evidence, statements and other information from a third party.

## For more information

If you'd like more detailed information you should contact us<sup>4</sup> for free help and advice.

## Disclaimer

The information contained in this publication is intended only as a guide to payments and services available.

The information in this factsheet is accurate as at April 2020. If you use this publication after that date, please check with us that the details are up to date.

## Should I lodge a claim?

We can't be sure if you'll get a payment, until you lodge a claim and your circumstances are taken into account. It's your responsibility to decide whether you lodge a claim for payment or not.

## From what date are the payments available?

Most government payments are paid from, or after the date on which the application is made so the sooner you lodge your application, the quicker you may be paid.

For Australian payments, you must lodge your claim and all supporting documents at the same time. If you don't your claim may not be accepted. The only exceptions will be if you're waiting for medical evidence, statements and other information from a third party.

## What do you need to do when dealing with a third party?

You may deal with a third party who's not a member of our staff. If you do, please remember that we haven't authorised any third parties to provide information or advice to you about payments.

## Notes

<p><b>1. Definition of a partner</b></p>	<p>For our purposes, a person is considered to be your partner if you and the person are living together, or usually live together; are married, in a registered relationship (opposite or same-sex), or in a de facto relationship (opposite or same-sex).</p> <p>The agency considers a person to be in a de facto relationship from the time they start living with another person as a member of a couple.</p> <p>The agency recognises all couples, opposite-sex and same-sex.</p>
<p><b>2. Australian residence</b></p>	<p>'Australian residence' means periods when you were residing in Australia as an Australian citizen or Australian permanent visa holder.</p> <p>Australian residence at any time is used to qualify for an Australian payment.</p> <p>'Australian Working Life Residence' is period/s of Australian residence between the ages of 16 and Australian Age Pension age only.</p>

<p><b>3. US social insurance contact details</b></p>	<p><b>Social Security Administration</b>  <b>1201 Roxas Blvd</b>  <b>Ermita</b>  <b>0930 Manila</b>  <b>PHILIPPINES</b></p> <p>Call <b>+63 2 5301 2000</b> extension <b>9</b>, from 8:00 AM to 11:00 AM, Tuesdays and Thursdays, except on Philippine and U.S. holidays.  Fax <b>+63 2 8708 9723</b>  Email <b>fbu.manila@ssa.gov</b></p>
<p><b>4. Services Australia contact details</b></p>	<p>Go to <b>servicesaustralia.gov.au</b>  Call <b>131 673</b> from within Australia.  Call <b>1866 3433 086</b> from the USA only.</p> <p><b>Note:</b> this international <b>Freecall™</b> number connects you directly Services Australia. This <b>Freecall™</b> may not be available from every location within the USA and may not be free from mobile phones or public phones. You may need to insert coins/card in payphones as for a local call and this may not be refunded at the end of the call.</p> <p>If you aren't able to use the <b>Freecall™</b> number listed above, please contact us on <b>+61 3 6222 3455</b>.</p> <p><b>Note:</b> call charges apply—calls from mobile phones may be charged at a higher rate.</p> <p>Fax <b>+61 3 6222 2799</b>  Write to <b>PO Box 7809, Canberra BC ACT 2610, Australia.</b></p>
<p><b>5. Specified agreement country</b></p>	<p>Go to <b>servicesaustralia.gov.au</b></p>