

Claim for Financial hardship assistance for Home Care and Residential Respite Care (SA462)

Purpose of this form



You will need to complete this form if you are seeking financial hardship assistance with your fees and charges in Home Care, or the basic daily fee in Residential Respite Care (see page 2 for hardship details).

If you started receiving your Home Care Package before 1 July 2014, and remain subject to the fee arrangements in place at that time, you are not eligible for financial hardship assistance.

If you are seeking financial hardship assistance for permanent Residential Aged Care fees and charges, please complete the ***Claim for Financial hardship assistance for Residential Aged Care (SA461)*** form.

The Australian Government Department of Human Services (Centrelink) needs details about your expenses and any unrealisable assets (see page 6). We then can assess your eligibility to receive financial hardship assistance with your Home Care Package or Residential Respite Care fees and charges.

Important information

Australian Ex-Prisoners of War and Victoria Cross recipients

If you are an Australian Ex-Prisoner of War or Victoria Cross recipient you may not need to fill in this form.

You must have had an aged care means assessment to be eligible for financial hardship assistance. If you have not had a means assessment you will need to complete the:

- (digital) ***Aged Care Calculation of your cost of care (SA486)*** form, or
- (paper) ***Home Care Package Calculation of your cost of care (SA456)*** form.

Wait for your means assessment result before you continue with this financial hardship assistance claim.

For more information

Go to our website humanservices.gov.au/agedcare

Call us on Freecall™ **1800 227 475**.



To speak to us in other languages, call **131 202**.

Note: Call charges may apply.



If you have a hearing or speech impairment, you can contact the **TTY service** on Freecall™ **1800 810 586**.

Keep these Notes (pages 1 to 7) for your information.

Financial Hardship Assessment

Financial Hardship

Financial hardship assistance is available to aged care persons who do not have sufficient income to pay their fees and charges, and experience financial hardship due to circumstances outside their control. Your fees and charges may be reduced or waived according to your individual circumstances. In these circumstances, the Government will pay some, or all, of your fees and charges on your behalf to your Home Care or Residential Respite Care provider. Each case is assessed on an individual basis, taking into consideration a range of issues which may be unique to your situation.

Personal details of home care/respite care recipient

If you are completing this form on behalf of someone, you need to provide information about the person receiving the Home Care Package or Residential Respite Care, not your own details.

Income details

If you are not receiving any Centrelink or DVA payments OR you are receiving a Centrelink or DVA non-means tested payment listed below, you will need to complete this form.

Non-means tested payments

- Age Pension (Blind)
- Disability Support Pension (Blind)
- War Widow(er)s Pension
- Disability Pension paid by DVA (not including income support supplement)
- Income Support pensions (Blind) paid by DVA

If you have not completed the ***Home Care Package Calculation of your cost of home care (SA456)*** form, you will need complete this form and receive your means assessment before you can complete this form.

If you are receiving one of the means tested payments from Centrelink or DVA listed below and:

- you have updated your income and assets within the last 2 years, **or**
- your assets and income have not changed since you last provided an update do not complete this form. Contact us on the numbers below.

Means tested payments

- Age Pension
- Disability Support Pension
- Carer Payment (not including Carer Allowance)
- Special Benefit
- Widow Allowance
- Service Pension
- Income Support Supplement
- Veterans Payment
- Farm Household Allowance

If your income and assets have not been updated in the last 2 years or have changed since you last made an update, please **go** online through myGov or call Centrelink on **132 300** or DVA on **1800 555 254**.

Assets details

Investment property

This includes any property and/or land you own, both in Australia and/or overseas, other than your principal residence. If you (and/or your partner) jointly own the property and/or land you will need to record the percentage you own and the percentage your partner owns. For example, if you have an equal share in the property with your partner you will record 50 per cent in your share and 50 per cent in your partner's share.

Life insurance policy

This is only for a life insurance policy that can be cashed in. If your life insurance policy includes a funeral plan, you will need to provide details.

Motor vehicles, motor cycles or trailers

You will need to include any vehicles you own but are being used by someone else, such as a carer, family member or close friend.

Boats, caravans or motor homes

Do not include information if your boat or caravan or motor home is your primary residence. You will need to include any vehicles you own but are being used by someone else, such as a carer, family member or close friend.

Bonds or debentures

Bonds refer to government or semi-government bonds and does not include corporate bonds.

Debentures are a type of corporate bond which must be secured against property. A debenture is always a fixed rate investment.

Money on loan to another person or organisation

This includes money you have loaned to a carer, family member, close friend or organisation.

Shares, options, rights, convertible notes or other securities listed on the Australian Stock Exchange or a stock exchange outside Australia

This is only for investments listed on the Australian Stock Exchange (ASX), or corporate bonds if listed on the ASX. It does not include government or semi-government bonds.

Shares, options, or rights in public companies, not listed on a stock exchange

This is for investments not listed on a stock exchange either in Australia, or overseas.

Managed investments in and/or outside Australia

This includes any investments that you pay a broker to manage on your behalf.

Gifting details

Gifting is when you or your partner give away assets or transfer them for less than their market value, for example, you do not receive adequate consideration for the gift or transfer in the form of money, goods or services.

Gifting includes:

- money or any asset transferred to members of your family or other relatives
- gifts to other people or charities
- gifts to private trusts or companies where you or your partner are not the controller of the trust or company
- assets sold for less than their market value
- relinquishing control of a private trust or company (considered to have gifted all the assets held by the trust or company)
- transferring shares in a private company or units in a fixed trust and not receiving full market value for them.

Continued

Relief from financial hardship is not provided if you have chosen to gift:

- \$10,000 in the first financial year, **or**
- \$30,000 in 5 financial years – this cannot include more than \$10,000 in any financial year.

However, in situations when funds have been misappropriated by a third party or a gift was made by a power of attorney, financial hardship assistance may be considered if legal proceedings have begun to recoup the funds.

It is not considered a gift if you sell or reduce assets to meet your normal living expenses, for example, to buy goods like a fridge or washing machine, for home maintenance and/or improvements, or to pay for holidays for yourself. Payments for services received (e.g. lawn mowing) are also not included.

Expenses details

Essential expenses are those that you must pay to meet your normal day-to-day living costs. You will need to provide evidence of your essential expenses, for example, all bank statements for the previous 3 months and/or credit card statements, receipts, or copies of policies, rates notices and/or bills with your name and address and the amount paid.

Ambulance cover

This is the cost of your ambulance cover.

Artificial limbs, artificial eyes or hearing aids

The full cost of any prosthesis, or hearing aids you have may be considered. If your prosthesis/hearing aid is covered by a government scheme or program such as Medicare, the National Diabetes Services Scheme (NDSS) or the Australian Government Hearing Services Program, this amount will not be considered for financial hardship assistance.

Contact lenses

This is the monthly cost of your contact lenses

Costs relating to your home

These costs are for the house you are living in.

Rent or mortgage repayments

Rental payments or mortgage repayments for the house you are living in.

Home maintenance

This includes repair and replacements costs related to maintaining your home. This does not include services that the home care provider assists with, such as cleaning or home modifications.

Home insurance

This is the amount of home insurance you pay for your house and includes both home and contents insurance.

Rates

These are the council rates you pay for your house. If you are renting, you do not pay rates and cannot claim this expense.

Water, gas and electricity costs

This is your cost for water, gas and electricity. If you pay quarterly, divide your quarterly amount by 3.

Telephone and internet costs

This is the cost of your telephone (including mobile phone) and the internet.

Other

This is any other monthly cost you have in relation to your house.

Dental care

This is the cost of your dental care, including fees your dentist charges and the cost of dentures.

Food costs

This is the amount you spend on food.

Funeral plan

Funeral plans paid on a periodic basis may be included (does not include pre-paid funerals).

Home Care and/or Respite Care Fees

Fees and charges that you pay to your Home Care provider for your costs of care may be considered essential expenses. This includes the amount of your basic daily fee or any income tested fee. If you are not sure of these fees, ask your Home Care provider.

Other essential expenses

Other essential expenses not listed in another category.

Other medical expenses

If you have any other medical expenses include them. Examples include visits to the doctor or specialists, blood tests and x-rays.

Pharmaceutical costs

Include itemised pharmaceutical statements and bank and/or credit card statements for the previous 3 months, receipts and tax invoices/bills showing your name and address as evidence.

If evidence is not provided, the expense will not be accepted.

Prescription glasses

The total cost of one pair of prescription glasses per year may be included as an essential expense per year. The total cost of your glasses may be included.

Private health insurance

This is the cost of your private health insurance.

Transport related costs

These expenses include the cost of taxis and public transport to attend medical appointments (evidence required of appointment), the full cost of your vehicle registration, repairs and insurance.

Wheelchair and mobility aids

The full cost of any wheelchair and mobility aids you have paid, including motorised scooters, walking frames, and canes.

Expenses NOT considered essential

For financial hardship purposes, expenses that are NOT considered essential and should not be included as part of your essential expenses are the amounts spent by a third party, authorised to act on your behalf, on things other than for your benefit.

Unrealisable Assets

An asset may be considered unrealisable if you cannot sell or borrow against it.

Asset(s) may be **unrealisable** if it is:

- a house, which cannot be sold and a bank will not loan money against it
- a compensation payment
- a farming property or properties
- a frozen asset
- a jointly owned asset where the other person is not willing to sell the asset
- misappropriation of funds
- a retirement village property, **and**
- it is unreasonable to sell an asset.

The following situations are **not unrealisable** for financial hardship purposes:

- rented properties, **and**
- private trusts and private companies.

A house which cannot be sold or a loan taken out against it

A resident cannot sell or borrow against their house if the house is on the market but cannot attract a buyer and the asking price is no higher than 10 per cent above the assessed assets test. A resident who is in temporary hardship and is not expected to sell their home may be able to borrow against their home to alleviate hardship. The resident is only expected to borrow from banks, finance companies and similar institutions with whom they normally invest or with a government body set up specifically to assist certain businesses. If the resident claims they have tried to borrow against their house but have had their loan application rejected, evidence of their unsuccessful attempt to borrow is not required.

You must provide the following evidence:

- valuations from 3 real estate agents
- proof of the sale price
- proof showing the property has been actively on the market for at least 6 months.

Jointly owned property

Jointly owned properties (other than your partner), other than the family home, may be considered unrealisable if the other owner does not wish to sell the jointly owned property.

You must provide a copy of the title deed or rates notice showing joint ownership of the property. Also statement(s) from the other property owner(s) that they do not wish to sell the property.

Misappropriation of funds

In situations when funds have been misappropriated by a third party or a gift was made by a power of attorney, financial hardship assistance may be considered if legal proceedings have begun to recoup the funds.

You must provide the following evidence:

- letter from solicitor stating that legal proceedings have begun to recoup the gifted amount (letter from solicitor) OR Trustee letter regarding the legal proceedings
- if the gift was made while you were incapacitated, evidence must be shown to your mental state at the time (doctor's report or Aged Care Assessment Team (ACAT)/Aged Care Assessment Service (ACAS) results).

Frozen assets

If you have assets in frozen funds, you can apply to your fund for relief under Australian Securities & Investments Commission (ASIC) hardship measures. You may be able to access a portion of the funds held. It is expected that if you have frozen assets, you should apply for redemption of their funds under the fund's hardship provisions.

You must provide evidence of the outcome of your application (letter from the fund).

Situations where financial hardship will NOT be granted

You will not be eligible for financial hardship assistance for Residential Care Package costs if you:

- are a self-funded retiree and have not completed and lodged an income assessment form with the Department of Human Services
- are the sole owner of a property, other than the family home occupied by a spouse, dependent child/protected person, and prefer to rent the property rather than sell
- have on loan money to a private trust or company. Income may be deemed on the outstanding loan amount irrespective of whether you are a controller or non-controller. In the situation where you have relinquished control of a private trust or company, you are considered to have gifted all assets held by the trust or company.
- have made a gift, the limit you are able to give away is \$10,000 in the first financial year or \$30,000 in 5 financial years – this cannot include more than \$10,000 in any financial year.
- have assets, unless they are unrealisable assets, valued at more than the current threshold rates accessible via My Aged Care myagedcare.gov.au

For general information on fees and charges applying to aged care, go to My Aged Care website myagedcare.gov.au or call us on Freecall™ **1800 200 422**.

Person signing on your behalf

This form must be signed by the person the application is for or someone who is authorised to sign on their behalf. An authorised person may be an Enduring Power of Attorney, Power of Attorney (financial), or a person/organisation holding an administrative or financial order.

A person can apply for an assessment for the cost of care on behalf of someone else if:

- they are already acting as the person's nominee
- they hold a relevant power of attorney or guardianship order
- a letter from a doctor, nurse or similar health professional is provided stating that the customer is unable to sign the application form
- the application is made by the Director of Nursing at the aged care home where the customer is a resident.

Where the person is deceased only the executor of the will or a person holding letters of administration is authorised to sign on behalf of their estate.

If you wish to have a nominee or person permitted to enquire for Aged Care purposes you will need to complete and provide an ***Aged Care Request for a nominee (AC019)*** form. If you want more information about nominee arrangements, go to our website humanservices.gov.au/nominees or call us on Freecall™ **1800 227 475**

Help with your form

If you want information about how to answer the questions in this form, and:

- you receive a Centrelink income support payment, **or**
- you are a self-funded retiree,

call the Department of Human Services.

If you want information about how to answer the questions in this form, and:

- you receive a Department of Veterans' Affairs (DVA) income support payment,

call the Department of Veterans' Affairs.

For general information on fees and charges applying to aged care, call MyAgedCare on Freecall™ **1800 200 422**.

If you need specific advice on completing this form or on applying for financial hardship assistance, go to humanservices.gov.au/agedcare or call us on Freecall™ **1800 227 475**.

Keep these Notes (pages 1 to 7) for your information.

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Claim for Financial hardship assistance for Home Care and Residential Respite Care (SA462)

Filling in this form

- Use black or blue pen.
- Print in BLOCK LETTERS.
- Where you see a box like this Go to 1 skip to the question number shown. You do not need to answer the questions in between.

- 1 Have you previously provided details of your income to Centrelink or the Department of Veterans' Affairs?

If your income and/or assets have changed since you had the means test assessment, you must provide updated information to Centrelink or DVA.

- No  You must have had an aged care means assessment to be eligible for financial hardship assistance. If you have not had an assessment, you will need to complete the:
- (digital) **Aged Care Calculation of your cost of care (SA486)** form, or
 - (paper) **Home Care Package Calculation of your cost of care (SA456)** form.
- Wait for your means assessment result before you continue with this financial hardship assistance claim.

Yes Go to next question

- 2 Do you have assessed assets under 1.5 times the annual amount of the age pension?

Include the pension supplement amount and the energy supplement amount.

Do not include unrealisable assets.

Note: The threshold can be found on the My Aged Care website myagedcare.gov.au

- No  You may not be eligible for financial hardship assistance. Call us on Freecall™ **1800 227 475** before you continue with this financial hardship assistance claim.

Yes Go to next question

- 3 Have you gifted more than \$10,000 in the first financial year or \$30,000 in 5 financial years – this cannot include more than \$10,000 in any financial year?

No Go to next question

- Yes  You may not be eligible for financial hardship assistance. Call us on Freecall™ **1800 227 475** before you continue with this financial hardship assistance claim.

- 4 What type of care are you receiving?

Tick one


Home Care

Respite Care

- 5 Did you receive Home Care/enter Respite Care before 1 July 2014?

No Date you began receiving Home Care/
entered Respite Care

/ /

- Yes  You may not be eligible for financial hardship assistance. If you have received Home Care or Respite Care before 1 July 2014, call the Department of Human Services on Freecall™ **1800 227 475** before you continue with this financial hardship assistance claim.

- 6 Tick the fees for which you are claiming financial hardship assistance. If you are not sure leave blank.

Basic Fee

Income Tested Care Fee



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The following questions are about the person the assessment is for and their partner.

You (the person the assessment is for)

7 Your name

Mr Mrs Miss Ms Other

Family name

First given name

Second given name

8 Your gender

Male

Female

9 Your date of birth

/ /

10 Do you have a Centrelink or DVA reference number?

No *Go to next question*

Yes *Give details below*

Centrelink Reference Number (if known)

- - -

Department of Veterans' Affairs Reference Number

Name of Department of Veterans' Affairs payment

Your partner (of the person the assessment is for)

7 Your partner's name

Mr Mrs Miss Ms Other

Family name

First given name

Second given name

8 Your partner's gender

Male

Female

9 Your partner's date of birth

/ /

10 Does your partner have a Centrelink or DVA reference number?

No *Go to next question*

Yes *Give details below*

Centrelink Reference Number (if known)

- - -

Department of Veterans' Affairs Reference Number

Name of Department of Veterans' Affairs payment

You (the person the assessment is for)

11 Have you been known by any other name(s)?

Include:

- name at birth
- name before marriage
- previous married name
- Aboriginal or skin name
- alias
- adoptive name
- foster name.

No Go to next question

Yes Give details below

1 Other name

Type of name (e.g. name at birth)

2 Other name

Type of name (e.g. name before marriage)

If you have more than 2 other names, provide a separate sheet with details.

12 Your permanent address

Postcode

13 Details of Home Care/Respite Care provider

Name

Address

Postcode

If there is more than 1 Home Care/Respite Care provider, provide a separate sheet with details.

Your partner (of the person the assessment is for)

11 Has your partner been known by any other name(s)?

Include:

- name at birth
- name before marriage
- previous married name
- Aboriginal or skin name
- alias
- adoptive name
- foster name.

No Go to next question

Yes Give details below

1 Other name

Type of name (e.g. name at birth)

2 Other name

Type of name (e.g. name before marriage)

If your partner has more than 2 other names, provide a separate sheet with details.

12 Your partner's permanent address (if different to yours)

Postcode

14 Please read this before answering the following question.

Refer to the **Notes** for information about Assets.

Do you (and/or your partner) own an investment property?

No ► **Go to 16**

Yes ► *Go to next question*

15 What type of property is your investment property:

Vacant land

House

Townhouse (including duplex/triplex)

Self contained flat (part of or attached to a house)

Part of a farming property or hobby farm

Industrial premises

Retail premises

Commercial premises


Unit/flat

How many units/flats are in the block?

Other ► Give details below

Current market value

\$

 Provide a copy of the most recent mortgage statement and rates notice.


► *Go to next question*

16 Give details below of all accounts held by you (and/or your partner) in banks, building societies or credit unions.

Include savings accounts, cheque accounts, term deposits, joint accounts, accounts you hold in trust or under any other name, or money held in church or charitable development funds.

Accounts and term deposits outside Australia should be included, with the current balance in the type of currency in which it is invested. We will convert this into Australian dollars.

Do NOT include shares, managed investments or an account used exclusively for funding from the National Disability Insurance Scheme.

 Provide proof of all account balances (e.g. statements, passbooks). Copies can be provided.

1 Name of bank, building society or credit union

Account number (this may not be your card number)

Type of account

Balance of account \$

Currency if not AUD

Your share % Partner's share %

2 Name of bank, building society or credit union

Account number (this may not be your card number)

Type of account

Balance of account \$

Currency if not AUD

Your share % Partner's share %

If you (and/or your partner) have more than 2 accounts, provide a separate sheet with details.

17 Do you (and/or your partner) have a life insurance policy that can be cashed in?

Include:


- policies with a surrender value (e.g. whole of life, paid up and endowment policies).

Do NOT include:

- friendly society bonds, life insurance bonds, or funeral plans
- details of home, contents, car, mortgage or similar policies.

No Go to next question

Yes Give details below

 Provide a copy of each life insurance policy.

1 Name of insurance company

Policy number

Surrender value

\$

Your share %

Partner's share %

2 Name of insurance company

Policy number

Surrender value

\$

Your share %

Partner's share %


If you (and/or your partner) have more than 2 insurance policies, provide a separate sheet with details.

18 Do you (and/or your partner) own, partly own or have financial interest in any motor vehicles, motor cycles, trailers, motor homes, boats or caravans?

Do NOT include a boat or caravan that is your principal home.

No Go to next question

Yes Give details below

 Provide a copy of the registration for each vehicle.

1 Type of asset (e.g. car) Make (e.g. Ford)

Model (e.g. Focus) Year

Current market value Balance of loan(s)

\$ \$

Your share % Partner's share %

2 Type of asset (e.g. car) Make (e.g. Holden)

Model (e.g. Astra) Year

Current market value Balance of loan(s)

\$ \$

Your share % Partner's share %

3 Type of asset (e.g. boat) Make (e.g. Quintrex)

Model (e.g. Coastrunner) Year

Current market value Balance of loan(s)

\$ \$

Your share % Partner's share %

4 Type of asset (e.g. caravan) Make (e.g. Jayco)

Model (e.g. Heritage) Year

Current market value Balance of loan(s)

\$ \$

Your share % Partner's share %

If you (and/or your partner) have more than 4 motor vehicles, motor cycles, trailers, boats, caravans or motor homes, provide a separate sheet with details.

19 Do you (and/or your partner) have any bonds or debentures?

Bonds refer to government and semi-government bonds.

Include:

- investments in and/or outside Australia.

Bonds or debentures outside Australia should be included, with the current balance in the type of currency in which it is invested. We will convert this into Australian dollars.

Do NOT include:

- friendly society bonds, funeral bonds or life insurance bonds
- accommodation bonds for residing in an aged care facility.

No Go to next question

Yes Give details below

 Provide a copy of your investment portfolio.

1 Name of company

Type of investment

Current amount invested

Currency if not AUD

\$

Your share %

Partner's share %

2 Name of company

Type of investment

Current amount invested

Currency if not AUD

\$

Your share %

Partner's share %

If you (and/or your partner) have more than 2 bonds or debentures, provide a separate sheet with details.


20 Do you (and/or your partner) have money on loan to another person or organisation?

Include all loans, whether they are made to family members, other people or organisations or trusts.

Do NOT include loans to get accommodation in a hostel.

No Go to next question

Yes Give details below

 Provide a copy of the loan document or agreement (if any).

1 Who did you lend the money to?

Date lent

Amount lent

/ /

\$

Current balance of loan

Lent by you

Lent by your partner

\$

%

%

2 Who did you lend the money to?

Date lent

Amount lent

/ /

\$

Current balance of loan

Lent by you

Lent by your partner

\$

%

%


If you (and/or your partner) have more than 2 loans, provide a separate sheet with details.

21 Do you (and/or your partner) own any shares, options, rights, convertible notes or other securities **LISTED** on the Australian Stock Exchange (e.g. ASX, NSX, APX or Chi-X) or a stock exchange outside Australia?

Include shares traded in exempt stock markets.
Do NOT include managed investments.

No Go to next question

Yes Give details below

 Provide the latest statement for each share holding.

1 Name of company

ASX code (if known) Number of shares or other securities

Country if not Australia Your share % Partner's share %

Margin loan balance

2 Name of company

ASX code (if known) Number of shares or other securities

Country if not Australia Your share % Partner's share %

Margin loan balance

3 Name of company

ASX code (if known) Number of shares or other securities

Country if not Australia Your share % Partner's share %

Margin loan balance


If you (and/or your partner) have more than 3 share holdings, provide a separate sheet with details.

22 Do you (and or your partner) own any shares, options, or rights in PUBLIC companies, **NOT listed** on a stock exchange?

Do NOT include managed investments.

No Go to next question

Yes Give details below

 Provide the latest statement detailing your share holding for each company (if available).

1 Name of public company

Type of shares Number of shares

Current market value Your share % Partner's share %

2 Name of public company

Type of shares Number of shares

Current market value Your share % Partner's share %

3 Name of public company

Type of shares Number of shares

Current market value Your share % Partner's share %

4 Name of public company

Type of shares Number of shares

Current market value Your share % Partner's share %

If you (and/or your partner) have more than 4 share holdings, provide a separate sheet with details.

23 Do you (and/or your partner) have any managed investments in and/or outside Australia?

Include:

- investment trusts or personal investment plans
- life insurance bonds or friendly society bonds
- approved deposit funds or deferred annuities
- retirement savings accounts
- Self Managed Superannuation Funds (SMSF) and Small APRA Funds (SAF) if the funds are complying


Do NOT include:

- conventional life insurance policies, funeral bonds or rollover investments.

APIR code – is commonly used by fund managers to identify individual financial products.

No Go to next question

Yes Give details below

 Provide a document which gives details (e.g. certificate with number of units or account balance) for each investment. Including latest council rates notices for any real estate held by SMF and SAF.

1 Name of company

Name of product (e.g. investment trust) Type of product/option (e.g. balanced, growth)

Number of units APIR code (if known)

Current market value Currency if not AUD

\$

Your share % Partner's share %

2 Name of company

Name of product (e.g. investment trust) Type of product/option (e.g. balanced, growth)

Number of units APIR code (if known)

Current market value Currency if not AUD

\$

Your share % Partner's share %

If you (and/or your partner) have more than 2 managed investments, provide a separate sheet with details.

24 Do you (and/or your partner) have any special collections such as stamps, art works or antiques?

No Go to next question

Yes Give details below

What is your estimate of the total value of these collections?

\$

 Provide copies of valuation certificates or insurance valuations (if available).

25 Please read this before answering the following question.

Gift-giving is when a person gifts or disposes of assets, including transferring or selling assets, for less than market value.

For more information about gifting, refer to 'Gifting' in the **Notes**.

Have you (or your partner) gifted cash or assets before or after you started receiving Home Care/entered Respite Care?

No Go to next question

Yes Give details below

1 What you gave away or sold for less than its market value (e.g. money, car, second home, land, farm)

Date given or sold What it was worth

/ / \$

What you got for it Your share Partner's share

\$ % %

Was this gift to a Special Disability Trust (SDT)?

No Yes

2 What you gave away or sold for less than its market value (e.g. money, car, second home, land, farm)

Date given or sold What it was worth

/ / \$

What you got for it Your share Partner's share

\$ % %

Was this gift to a Special Disability Trust (SDT)?

No Yes

If you (and/or your partner) have given away or sold for less than its market value more than 2 items, provide a separate sheet with details.

26 Please read this before answering the following question.

For information about the expenses you can claim, refer to 'Expenses details', in the **Notes**.

Are you claiming expenses?

No Go to next question

Yes Give details below



Provide itemised pharmaceutical statements and bank and/or credit card statements for the previous 3 months, receipts and tax invoices/bills showing your name and address as evidence. Refer to the **Notes** on page 4 for evidence required for each expense listed below. If evidence is not provided, the expense will not be accepted.

List your expenses and amounts you are submitting. Complete the amount in whole dollars for each item and select if you pay the amount weekly, fortnightly, monthly or annually.

1 Ambulance cover

\$

Weekly Fortnightly Monthly Annually

2 Artificial limbs, eyes or hearing aids for amounts that are not already covered by other Government schemes or programs

\$

Weekly Fortnightly Monthly Annually

3 Contact lenses

\$

Weekly Fortnightly Monthly Annually

Continued

4 Costs relating to your home

Rent or mortgage repayments

\$

Weekly Fortnightly Monthly Annually

Home maintenance

\$

Weekly Fortnightly Monthly Annually

Home insurance

\$

Weekly Fortnightly Monthly Annually

Rates

\$

Weekly Fortnightly Monthly Annually

Water, gas, electricity

\$

Weekly Fortnightly Monthly Annually

Telephone and internet

\$

Weekly Fortnightly Monthly Annually

Other

\$

Weekly Fortnightly Monthly Annually

5 Dental care

\$

Weekly Fortnightly Monthly Annually

6 Food costs

\$

Weekly Fortnightly Monthly Annually

7 Funeral plan – paid on periodic basis

\$

Weekly Fortnightly Monthly Annually

8 Home Care and/or Respite Care Fees

\$

Weekly Fortnightly Monthly Annually

9 Other Medical expenses

This includes expenses incurred under a health professional's direction

\$

Weekly Fortnightly Monthly Annually

Privacy notice

28 You need to read this

Privacy and your personal information

Your personal information is protected by law (including the *Privacy Act 1988*) and is collected by the Australian Government Department of Human Services for the assessment and administration of payments and services.

Your information may be used by the department, or given to other parties where you have agreed to that, or where it is required or authorised by law (including for the purpose of research or conducting investigations).

You can get more information about the way in which the department will manage your personal information, including our privacy policy, at

humanservices.gov.au/privacy

29 I consent to:

- the Department of Health providing the Australian Government Department of Human Services and the Department of Veterans' Affairs with information about periods, types and levels of care, and assessments for my current and/or previous care, if required to complete my assessment.

I declare that:

- the information I have provided in this form is complete and correct.

I understand that:

- giving false or misleading information is a serious offence.

Signature of aged care recipient
(or the person signing on their behalf)



Date

/ /

- For the **person signing on behalf** of the person the assessment is for, continue to the next question.

30

If someone signs on your behalf

Mr Mrs Miss Ms Other

Family name

First given name

Second given name

Address

Postcode

Phone number

Relationship to the person who the assessment is for

Make sure you have read the **Privacy and your personal information** on this page.

Signature of legal guardian, power of attorney or existing aged care nominee



Date

/ /

When two or more people have joint power of attorney, all people with joint power of attorney need to sign. If more than two signatures are required, provide a separate sheet with details.

Signature of second legal guardian, power of attorney or existing aged care nominee



Date

/ /



Which of the following documents are you providing with this form?

A copy of the power of attorney order

A copy of the administration order

A copy of the financial management order

A letter from a medical professional

N/A – existing aged care nominee arrangement

Continue to next page

Checklist

Which of the following forms and documents are you (and/or your partner) providing with this form?

You must provide **copies** of documents. The copies will not be returned.

If you are not sure, check the question to see if you should provide the documents.

Tick ALL that apply	
Copy of the most recent mortgage statement and rates notice (If you answered Yes at question 15)	<input type="checkbox"/>
Copy of documents showing balances for bank, building society and credit union accounts (If required at question 16)	<input type="checkbox"/>
Copy of the latest life insurance statement (If you answered Yes at question 17)	<input type="checkbox"/>
Copy of the registration for each vehicle (If you answered Yes at question 18)	<input type="checkbox"/>
Copy of your investment portfolio (If you answered Yes at question 19)	<input type="checkbox"/>
Copy of loan document or agreement (if available) (If you answered Yes at question 20)	<input type="checkbox"/>
Latest statement for each share holding (If you answered Yes at question 21 and/or question 22)	<input type="checkbox"/>
Latest statements with details for each investment (If you answered Yes at question 23)	<input type="checkbox"/>
Copies of valuation certificates or insurance valuations (If you answered Yes at question 24)	<input type="checkbox"/>
Supply statements and the evidence required for each expense listed at question 26 (If required)	<input type="checkbox"/>
Supporting evidence of unrealisable assets (If required at question 27)	<input type="checkbox"/>

Returning your form

Check that all required questions are answered and that the form is signed and dated.

Return this form, and copies of additional documents by mail to:

**Department of Human Services
Residential Care
PO Box 7821
Canberra BC ACT 2610**