



# Timbrebongie House Limited



## INFORMATION BOOKLET

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# **Timbrebongie House Limited Information Booklet Contents**

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### Welcome to Timbrebongie House

It is hoped this information book will answer any questions you may have regarding the care and services provided by the facility. If you have any questions that are not covered in this booklet, we encourage you to contact Timbrebongie Office staff who will be able to help you.

Timbrebongie House welcomed its first residents in January 1990. Timbrebongie House is a community project which was built for the frail aged in the local area to allow our residents to remain near their families while receiving quality care consistent with their needs. Timbrebongie provides a homelike residence for forty-seven (47) residents. There are thirty (30) hostel rooms, one (1) respite room and sixteen (16) rooms in the secured wing. Ageing in place is practised.

### Vision, Quality Statement, Philosophy & Goals

#### **OUR VISION**

To ensure our residents, receive quality care, with privacy and dignity in a safe homelike environment with an emphasis on residents having a choice.

#### **QUALITY STATEMENT**

Management and staff are committed to maintaining and improving on our existing quality standards, and to allocate sufficient resources to ensure that quality remains at the heart of our business.

#### **PHILOSOPHY & GOALS**

Timbrebongie House believes that all residents have the right to live the latter stages of life with the dignity and respect which all persons deserve, and to live it in an environment compatible to their physical, social, spiritual, and emotional needs. We also believe that each person is an individual, irrespective of identity, culture, and diversity and that we have a duty of care to assist all who need assistance. We accept that within our role, as carers of our residents, we have a responsibility to respect the importance of their families and to include them in decisions about the care of their loved one. We shall therefore aim to provide personalised individual care for our residents in a safe environment which respects individuals, choice of care and lifestyle.

## Administration

### Admission to Timbrebongie

Prior to admission, the **Resident Application Form** must be completed for both permanent and respite residents. This is enclosed in the information booklet.

### Unsuccessful Applications

Timbrebongie will do its utmost to accept those that apply to stay with us, but most that apply cannot be admitted. Our facility and other factors limit who we can care for. Decisions on unsuccessful applications are final and there is no avenue for appeal.

### Orientation on Entry to the Facility

Wherever possible prior to entry, the resident will be shown the room they are to occupy, the dining area and all other areas throughout the facility. Upon entry, a staff member will make the resident familiar with the emergency call system, lights, fan and heating operation. Staff will make the new residents aware of mealtimes, menu, the mail facilities and anything else considered necessary to assist in settling in.

### How we spend your contributions

The fees that you as a resident pay to Timbrebongie each fortnight go towards the running of the services and the upkeep of the facility and grounds. Some of the things that it helps pay for are food, electricity, water rates, council rates, rubbish disposal, gas, insurances and staff costs. We receive a subsidy from the Commonwealth Department of Social Services to assist with the ongoing care needs of residents.

### Complaints & Feedback

A resident or their authorised representative should feel free to lodge a complaint if they consider it necessary. The complaint should be lodged with the Chief Executive Officer. All Complaints/Feedback are treated confidentially if required. A resident or representative should never fear reprisal in lodging a complaint for this would be in direct contrast to the philosophy of the facility. Details of procedures for disputes are included in the Resident Agreement signed by the resident on entry.

### Disputes

Rules are detailed in the resident's agreement or through our Complaints policy.

### Complaints Resolution

There are mechanisms in place for Residents to have complaints, or disputes heard. The full procedure is outlined in the resident's Agreement, but in short, the residents should first take the matter to the Chief Executive Officer. If the matter cannot be resolved, the resident may then make a **written** complaint to the Chairman of the Board of Directors by emailing to [admin@timbrebongie.com.au](mailto:admin@timbrebongie.com.au).

Alternatively, the Commission provides a free service for anyone to raise a concern about the quality of care or services provided to people receiving Australian Government funded aged care. Find out more at [agedcarequality.gov.au](http://agedcarequality.gov.au) or call **1800 951 822**. Older Persons Advocacy Network (OPAN) – sometimes making a complaint on your own can be difficult. OPAN can be reached on **1800 700 600** or by visiting [opan.com.au](http://opan.com.au).



## Administration

### Agreement

Having agreed to enter the aged care facility, the resident (or representative) will be asked to sign a residential agreement. These agreements are required by the Commonwealth to set out the terms and conditions that both the Approved Provider (Timbreebongie House Ltd) and resident agree to be bound by. If the resident is unable to sign the agreement we look to a legally appointed representative (such as the Guardianship Board or a person holding Power of Attorney), or a responsible person as per the Aged Care Act.

### Making a Will

To avoid problems for family members it is recommended that all residents have a current will. It is also advisable that family members know where the will is located. On your application for residency, you will be asked to nominate your choice of Solicitor. Staff members **MUST NOT** be a legal witness to any document signing.

### Power of Attorney

You may consider appointing a Power of Attorney. This can be arranged by your solicitor and is usually a family member or a close friend. There are two types - an ordinary power of attorney and an enduring power of attorney. An ordinary power of attorney ceases to have an effect when a person loses mental capacity whereas an enduring power of attorney continues in force after that time. You may wish to consult your solicitor for further information.

### Guardianship Board

The Guardianship Board is a legal tribunal. It appoints **guardians** and **financial managers** for people 16 years and over who are incapable of making their own lifestyle and financial decisions and have no suitable formal arrangements in place. The Board can also consent to certain medical and dental treatment for people over 16 years who are incapable of consenting to their own treatment. A guardian is not a substitute caregiver or case manager and does not replace these people. A family member or a friend can be appointed guardian, or the Board can appoint a Public Guardian. The Board can appoint single, joint or alternative guardians. In most cases the guardians have specific functions such as:

- \* Accommodation (deciding where the person lives)
- \* Health Care (deciding health care and medical treatment)
- \* Consent to medical and dental treatments
- \* Services (authorise others to assist in the home)

Guardians are appointed for a specific period of time. The Board reviews the order at the end of that period. The guardian may be dismissed or re-appointed.

**Financial Managers** protect a person's financial affairs while evidence of their capability to manage their own affairs is gathered. If the person is not capable, a financial manager is appointed for a period of time. The financial manager can be a family member, friend or the Board may appoint the Protective Commissioner. Anyone with a concern for the welfare of a person who is incapable of making their own decisions can apply to the Guardianship Board, when an application is received the Board will investigate the matter.

## Administration

### Respite Care Services

There is one (1) respite room available at the residential aged care facility which has been set aside specifically for respite care provision. A resident entering respite care only is permitted a maximum of 63 days within the financial year across all facilities.

### Leave Entitlements for Permanent Residents

Permanent residents are entitled to 52 instances of overnight leave (social leave) per financial year. This allows the resident to have time away from the facility whilst retaining their place in the facility. If the resident chooses to have more than 52 days social leave in any one given year, the Government ceases to pay the subsidy until the leave ceases. In these cases, the residential aged care facility recovers the subsidy equivalent from the resident, in addition to the resident's normal daily fees. On leaving the facility the resident is required to sign themselves out and back in on return. Residents also will need to see the Registered Nurse for any medication they will need whilst away. If you require hospital leave, your permanent place will be maintained at the facility until you return. Whilst in hospital, you will continue to pay your regular fees in accordance with the Aged Care Act. Respite residents are not permitted any overnight leave. If you require hospital admission whilst on respite, your respite admission will cease.

### Doctors' Appointments or Specialist Care - Transport Options

We will arrange for medical and health practitioners to visit you at the service as appropriate to your needs. Alternatively, we will make arrangements for you to visit a health practitioner if the practitioner is unable to visit the service. We will assist with arranging transport to and from the appointment where necessary. Relatives, representatives, or volunteers should accompany you to the appointment and we will assist in arranging this if you require.

Narromine Community Drivers are available at a cost of \$50 per trip to take the resident into Dubbo for medical appointments. Transport will be arranged by the office staff.

Department of Veteran Affairs may be contacted to arrange travel for DVA residents attending appointments. DVA transport will be arranged by the office. Only under emergency circumstances will arrangements be made for staff to accompany the resident to appointments at a cost to the resident / representative.

### Motor Vehicles

Residents are not permitted to have a motor vehicle at the residential aged care facility. Timbregongie House has a no car policy.

## Administration

### Motorised Scooters

In the interest of resident safety, motorised scooters, or the like, are not permitted within the residential aged care facility building.

- \* Resident must have authorisation to use a motorised scooter
- \* Resident must undergo an assessment.

It is the responsibility of the family members to ensure the gopher is serviced annually, maintained as required and any damages paid for.

It is the responsibility of the family members to ensure the gopher is serviced annually maintained as required and any damages paid for.

### Advance Care Directive

An Advance Care Directive is a written statement outlining the resident's wishes regarding future medical treatment and care provisions. An Advance Care Directive will only be used if a person loses the ability to make their own decisions. This is very personal, and it is your decision as to what would be an acceptable, ongoing quality of life for you.

### Funeral Arrangements

On your application for residency you will be asked to nominate your choice of Funeral Director.

**Please note** that our default Funeral Director is Abbey Funeral Home, 93 Wingewarra Street, Dubbo. In the event of the resident's death if they have not specified a Funeral Director, this default will be used.

### Voting

If the resident would like to continue to vote, in-house voting can be arranged in advance or postal voting. If the resident does not want to vote the family can arrange to have the resident's name removed from the electoral roll.



## Accommodation

### Smoking

Timbrebongie is a smoke free environment, however there is a designated outside smoking area which staff, residents and visitors can use. All residents who smoke are offered a smoke retardant apron to wear whilst doing this activity. A risk assessment will be conducted, and a Dignity of Risk form completed, with risks explained to the resident.

### Home Environment

Residents are encouraged to view Timbrebongie House as their home and to continue their social activities as usual. They are free to come and go as they please and to invite visitors to their home. It is expected that all residents will respect the privacy and independence of each other. Residents are responsible for the quiet orderly conduct of themselves and their visitors at all times.

### Privacy

All residents are to respect the privacy of all other persons living within the facility. Residents are encouraged to knock before entering another resident's room. Residents may not enter another person's room if they are absent. No staff member will ever enter a resident's room without knocking.

### Building Security and Valuables

The Administrative building will be closed, and all external doors locked at 7.00 pm. There is a bell to the right of the front door if entry is required after hours. Residents are responsible for the security of their own rooms. No responsibility is accepted by the Residential aged care facility management for money or valuables left in residents' rooms. Personal property insurance is the responsibility of the resident. Timbrebongie House will take all possible precautions but accept no responsibility for lost or stolen items.

### Respite Room

This room is fully furnished and equipped by the facility. The incoming resident need only to bring personal effects to make the room homely. Should management consider there is possibility of injury to a resident, they will advise the resident or representative of their concern. If the resident decided to act against this advice, the staff recommendation will be documented, signed and dated.

### Sign In/Out Book

There is a book at the front foyer that residents are requested to sign before they go out and on their return. This enables staff to inform family or friends of a resident's whereabouts if they are trying to contact them. It is also very important that staff know of the whereabouts of all residents in the event of an emergency. All residents are asked to cooperate in this matter at all times.

## Accommodation

### Maintenance Request

Should a resident need a small repair carried out in their room, or notice some problem throughout the building or grounds, they are asked to write down their request and hand it in to the front office.

### Bed Linen

All linen is provided by the facility for a single bed (sheets, pillowcases, towels, face washers, bathmat). Items are changed on a weekly basis or when necessary. If you prefer, you may bring your own items from home, but they must be tagged with the resident's name for identification. If the resident chooses to provide their own king single bed, they will be responsible to provide king single linen.

### Cleaning of Residents' Rooms

Resident's rooms are cleaned on a weekly basis or more often if required. Residents may, however, choose to maintain the responsibility for dusting and cleaning of personal fragile ornaments or other personal items. Resident's family / representative are responsible for tidying the resident's wardrobe and drawers in the resident's room.

### Emergency Call Buzzers

On admission to the facility, each resident will be given an Nurse Call Pendant. This is a portable pendant, which may be worn around the neck or carried. In the case of need, it may be activated by the resident, which will immediately register on our alarm system. The receiver is carried by our care staff. An emergency buzzer is also fitted in the shower recess and near the toilet. Activating the alarm will result in a staff member attending the resident's room at the earliest opportunity.

### Nurse Call Pendants

Residents are issued with Nurse Call Pendants to enable them to call for assistance. These pendants are costly, and we require that they be returned on the resident's departure. There will be a fee for any pendant not returned. The current cost of a pendant is \$170.00

### Fans

Ceiling fans are installed in each of our hostel rooms as well as air conditioning units in every room. We request resident's do not use other fans in their rooms.

### Inspection of Rooms

The Chief Executive Officer will carry out an inspection of all permanent and respite rooms twice yearly in order to plan any repairs and maintenance in compliance with Workplace Health and Safety requirements.

## Accommodation

### Security

Residents may choose whether or not they lock the doors to their rooms. If a resident is away from his/her room for any length of time the door will be locked to maintain good security.

### Mail

Australia Post delivers mail to Timbrebongie daily. Mail is sorted by the office staff and distributed to the residents. Outgoing mail may be left at the front office for collection by Australia post mid-morning each day.

### Suggestions / Complaints Box

There is a box situated near the drink machine for the use of residents or their representatives, should they wish to make a suggestion, comment or complaint for consideration by Management. Alternatively, residents or visitors are asked to speak directly with the Chief Executive Officer if they have a suggestion that could be of benefit to the residents.

### Fire Drill

Staff participate in fire drills on a regular basis to ensure in the event of fire or any other emergency residents are evacuated in an orderly manner. In the event of a fire please try to stay calm and follow the instructions from staff who have been trained to follow safety procedures in the event of an emergency.

### No Mat Policy

It is the policy of this facility that residents are not permitted to have a mat in their room. This is to safeguard them, staff and visitors against a trip resulting in injury.

### Electrical Appliances

Before entering the facility, you must have any personal electrical appliances such as television, bedside clocks, lamps, radios that will be used with the facility certified and tagged as safe for use by a qualified electrician. Residents are not permitted to have double adaptors. Power boards approved by the facility are permitted.

Electric jugs / kettles, electric blankets, fan heaters and other portable heaters are not permitted. All subsequent electrical equipment purchased will be tested and tagged by a qualified electrician. Televisions and radios are permitted; however, they must not be operated at a volume which would disturb other residents. Radios and televisions must not be on during mealtimes.



## Accommodation

### Resident's Key to Room

We have installed a secure key system with a special key provided to the resident for their room. A \$50 replacement fee will be charged for any lost key.

### Visitors

Visitors are always welcome at Timbrebongie. Staff lock the main doors at 7pm each evening. If anybody requires entry after this time, they may ring the bell on the right at the front door. Visitors are requested to sign in and out of the facility. This way we have a record of all persons on the premises at any given time in the event of an emergency.

Visitors entering the facility must sign in and out. A Staff member will take their temperature, ask screening questions and ask visitor to sanitise their hands / items being brought into the facility.

### Laundry

Laundry of clothing is provided daily. To ensure all laundry is returned to its rightful owner, Timbrebongie has purchased a clothing labelling system which is guaranteed not to wash off during the laundering process. Management strongly encourages residents to ensure all clothing is labelled using this system. A small fee of \$1.10 per label is charged for the first 100 labels.

A resident may choose and pay for their own labelling system if it is at least of an equivalent standard to Timbrebongie's system e.g. Woven name tags.

Please make sure all clothing is made from wash and wear fabric. **Woollen jumpers, cardigans and delicate clothing are not washed at facility.** These articles are the responsibility of the resident's family.

### Hairdresser

The facility has a fully equipped salon and a hairdresser who visits Timbrebongie on Tuesday, Wednesday, and Thursday. The hairdresser charges a fee for this service.

### Independence

Residents are encouraged to maintain their independence. However, assistance is always available to Residents where necessary.

### Bringing Food into the Facility

In the spirit of controlling good hygiene and infection control Timbrebongie reserves the right to inspect residents' rooms for stale, excess or out of date food. If found and considered inappropriate the resident will be given options on the removal or disposal of such food.

Family and visitors are asked not to provide food to other residents.

## Accommodation

### Meals

All meals are prepared with consideration to taste, nutrition, cultural need and presentation. There are summer and winter menus rotated every four weeks.

Meal-times are:	Breakfast:	7.30 am
	Morning tea:	10.00 am
	Lunch:	12.00 noon
	Afternoon tea:	3.00 pm
	Dinner:	5.30 pm
	Supper:	8.00 pm

All meals are served in the main dining room. If for reason of illness or frailty the resident is unable to come to the dining room, trays can be taken to the resident's room.

Please inform the kitchen staff if you are unable to attend the Dining Room or if you wish to have your meal saved. Should residents not be able to eat certain foods for cultural or religious reasons please inform our staff and we will endeavour to provide alternate food choices.

### Fruit

Fresh fruit is available at the evening meal. Residents are encouraged to eat fresh fruit daily.

### Alcohol

Residents have the right to consume alcohol within the facility, however, we ask that alcohol consumption be kept at a socially acceptable level in respect of the rights of other residents. Our preference is for the Care staff to hold the alcohol securely and dispense it to the resident upon request.

### Entertaining visitors

The facility has spacious grounds with outdoor furnishings which are available for residents and visitors use. Residents can also entertain their guests in the library, lounge area, dining room or in their own room.

### Family and Friends

Family and friends are welcome at the facility at all times. We ask visitors to call in advance before making the trip as Residents may be on an excursion or have other visitors etc. – please call 02 6889 1611. When there is a special function, residents are encouraged to invite family and friends. On these occasions, numbers are restricted to one guest per residents due to the size of the venue.

### Freedom of Choice

Management encourages residents in the facility to consider it their home and as far as possible to maintain an interest in activities of their choice. No resident is obliged to do anything against his or her will or wish. Residents are encouraged to make their own decisions as to what they wish to do, or what activity they may care to do.

## Accommodation

### Freedom to come and go

Residents are free to come and go as they please. It is requested that prior to going away for any length of time they inform the RN's and office staff.

### Residents Outdoor Plants and Furniture

If you choose to have outdoor pot plants, two large containers are permissible or if you have a group of small pots plants, they must be kept on an appropriate plant stand. This will avoid clutter. The resident is solely responsible for the maintenance and watering of any plants they bring into the facility.

Potted plants and furniture are not permitted on the grassed areas on a permanent basis.

If you choose to bring in outdoor furniture it must be inspected by the maintenance staff to ensure it is safe, and suitable for outdoor use, does not encroach on the passage of other residents, staff and tradespeople and it must be in keeping with the environment of Timbrebongie House.

### Pets

Residents are not permitted to bring pets into the facility other than daytime visits. Timbrebongie has bird aviaries for the resident's enjoyment.



## Activities

### Information on Social Activities

On entry to the facility, the Chief Executive Officer will request information from you or your representative about your hobbies, interests, background etc. This information assist staff to develop a Care Plan which help staff understand and respond to your individual needs.

All residents are encouraged and supported to participate in social and recreational activities. If the resident wishes not to participate in a certain activity, alternative interests will be sought. Timbrebongie employs Recreational Activity Officers who are responsible, amongst other duties for organising activities after consultation with residents where craft, painting, cooking, bus trips, bingo, massage, indoor bowls, happy hour, singing, Zumba and other choices are suggested.

Please consult with our Recreational Officers or members of staff if you have a particular activity you wish to see organised or in which you wish to participate.

### Community Activities

Residents are encouraged to be involved in community activities. All members of the Timbrebongie team promote and encourage residents to remain active and engaged in community involvement. We ensure that our services and program proactively build relationships with cultural and linguistically diverse members of our community.

### Newspapers and Magazines

Delivery of newspapers and magazines can be arranged through the local newsagent for delivery to the facility. This must be organised by the resident or their representative with the newsagent.

### Residents' meetings

Residents meetings are held regularly and provide a forum for discussion on all aspects of resident care.



## Activities

### Religious Services

Timbrebongie House is a non-denominational facility: however, residents are encouraged to continue to attend services of their personal choice. Timbrebongie holds a church service each Wednesday at 9:30 am in the Mark Ryrie Lounge room. The service is conducted by one of our local ministers.

### Religious or Cultural Backgrounds

Timbrebongie will consider all applications no matter what religion or cultural background. Your special needs will also be given due consideration with respect to provision of care.

### Bus Outings

Timbrebongie staff take residents on a weekly bus trip to visit different areas of our region each week. The bus has 12 seats, therefore residents take turns about each week going on the bus.



## Care & Specialised Services

### Medications

The Registered Nurse and Personal Care Staff will supervise medications for residents. Medications are kept in the medication trolley and detailed records are maintained of all medications dispensed to the residents. Staff may not administer any prescription drug to a resident without written instructions from a Medical Practitioner. A medication chart must be completed by your Doctor which includes all medication including over the counter items **before** admission. This applies to all medications and treatments including non-prescription medications. Therefore, all pharmacy goods must be listed on the medication chart and are dispensed by Timbrebongie Care staff.

### Doctors' Appointments or Specialist Care

Appointments can be made for a resident to visit a Doctor or, when referred, a specialist, X-Ray Unit, Dentist, Pathologist and other Allied Health Professionals including Dental appointments.

All Narromine Doctors visit Timbrebongie. Generally, the Doctor will visit his or her patients in the Doctor's room at Timbrebongie for routine consultation. Residents may choose to go to their Doctors Practice for their consultation. In this case, the resident's family or representative will be asked to assist the resident to attend these appointments, but where this is not possible, appropriate care staff will accompany the resident. An hourly fee will be charged to the resident.

### Excellent, Individualised Care Plans

We recognise everyone has their own unique personality, health needs and living preferences. So, we work with you and your family, together with your Doctor and health professionals, to develop an individualised care plan. We support residents to exercise choice and independence to make decisions about their own care and the way care and services are delivered. Residents are encouraged to make decisions about when family, friends, carers or others should be involved in their care and to be able to communicate their decisions. Care Plans will be made available on request.

### Residents Encouraged to Maintain Relationships

Residents will be supported to make connections with others and maintain relationships of choice, including intimate relationships.

### Dignity of Risk

Staff to recognise that genuine self-determination includes residents being able to engage in the "dignity of risk". That is, some choices that self-determining, informed adults want to make will involve a level of risk or potential harm.

For example: If a resident is going to drive their gopher downtown during heatwave conditions, staff will discuss risks involved with the resident. This may include the possibility of heat stroke, sunburn, dehydration, disorientation resulting in an accident. They will be supported to take risks to enable them to live the best life they can.



## Care & Specialised Services

### E Health Records

Residents are encouraged to register for an Electronic Health Record (eHealth record).

If you have an eHealth record and need medical treatment, be it out of hours, in an emergency or from a different doctor, important health information, such as past treatments, or current medications will be quickly accessible to them.

### Dentures, Glasses and Hearing Aids

It is essential dentures, glasses and hearing aids are marked with the resident's name prior to admission. Timbrebongie House does not accept any responsibility for the loss / damage of these items. It is strongly recommended the prospective resident visit the dentist prior to admission to ensure that teeth and gums are healthy, and dentures are labelled.

### Infection Control

Good handwashing practices are recommended at Timbrebongie to help prevent the spread of infectious disease. Hand sanitisers are dotted around the facility for use by residents, staff and visitors.

### Internal Transfer

If, in the opinion of the Chief Executive Officer or Clinical Services Team, it is desirable by reason of your state of health or for any other sufficient reason that you should move, either temporarily or permanently, to another room within the facility, or to a hospital or other suitable accommodation, the Chief Executive Officer or Clinical Services Team will, after consultation with you and/ or your nominated representative and, where appropriate, your medical practitioner, endeavour to arrange the move.

Management does not promise that, if and when your needs change the facility will be able to provide the level of care and services which you will then require; or you will be able to move to accommodation elsewhere in the facility where levels of care and services appropriate to your needs can be provided. Due to the constant demand for rooms when a resident is deceased the following guidelines have been implemented:

- \* The resident's room will be left on hold for 7 days allowing time for the family to pack up their family members belongings
- \* Where it is not practicable for the furniture and effects to be removed within the specified time the Chief Executive Officer or designated staff member will telephone the family to establish a time as to when the belongings will be removed.

### Transferring from Facility to Hospital

Should it be necessary for a resident to be admitted to hospital, the resident's family or representative will be advised immediately.

## TIMBREBONGIE HOUSE LTD

### How to Submit an Application into Timbrebongie House

#### **TO LODGE AN APPLICATION FOR RESPITE**

1. Read the Information Booklet
2. Complete the Application Form and return to Timbrebongie House together with a current ACAT Report (support plan)

(Incomplete or unsigned forms will not be accepted)

#### **TO LODGE AN APPLICATION FOR PERMANENT ENTRY**

1. Read the Information Booklet
2. Complete the Application Form and return to Timbrebongie House together with a current ACAT report (support plan)
3. Complete the Residential Aged Care Calculation of your cost of care or Residential Aged Care Property details form and send off to the Department for processing ASAP. This process could take anything up to six (6) weeks. Please note some residents do not need to complete this book.

(Incomplete or unsigned forms will not be accepted)

## **TIMBREBONGIE HOUSE**

### **ROOM PRICING AND DESCRIPTION**

	ROOM TYPE 1	ROOM TYPE 2	ROOM TYPE 3
Room Category	Single Room + private ensuite	Single Room + private ensuite	Single Room + private ensuite
Maximum Occupancy	1	1	1
PRICE (*1) (See below) Maximum Refundable Accommodation Payment (RAD)	\$300,000.00	\$400,000.00	\$400,000.00
Maximum DAP (Maximum Daily Accommodation Payment)(*2)(See below)	\$66.99	\$89.32	\$89.32
Is the room offered on an extra service basis?	No	No	No
Explanation of Payment Options	<p>- Residents can choose to pay for their accommodation by a refundable deposit, a daily payment, or a combination of both.</p> <p>- A refundable deposit is paid as a lump sum amount. A daily payment accrues daily and is paid periodically, for example fortnightly. A combination payment includes both a partial lump sum and daily payments.</p>		
Example of combination payment of 50% Refundable Deposit and 50% Daily Pay't	Example RAD 50% Example RAD \$150,000 Example DAP 50% Example DAP \$33.49	Example RAD 50% Example RAD \$200,000 Example DAP 50% Example DAP \$44.66	Example RAD 50% Example RAD \$200,000 Example DAP 50% Example DAP \$44.66
<b>KEY FEATURES STATEMENT</b>	Description of Quality, Condition and Amenity of Rooms		
Description of quality, condition, and amenity of room	<p>These rooms are in the original section of the facility. The rooms are recently renovated and in excellent condition. They are constructed of double brick and have either carpet or vinyl flooring. They have a large wardrobe, lock up drawer and each room has a view to gardens or lawn areas. Each room has a ceiling fan as well as individual reverse cycle air-conditioning.</p>	<p>These rooms are in the original section of the facility. The rooms are maintained in good condition on an ongoing basis. They are constructed of double brick and have either carpet or vinyl flooring. They have a large wardrobe, lock up drawer and each room has an external door to gardens or lawn areas. Each room has a ceiling fan as well as individual reverse cycle air-conditioning.</p>	<p>These rooms are in the newer section of the facility. The rooms are maintained in good condition on an ongoing basis. They are constructed of brick veneer and have vinyl flooring. They have a large wardrobe, lock up drawer and each room has individual reverse cycle air-conditioning and in-floor heating.</p>
Size of Room	15m <sup>2</sup>	28m <sup>2</sup>	17m <sup>2</sup>
Description of quality, condition size and amenity of common areas to which a person living in this area would have access	The occupants of these rooms have access to the main dining/lounge area 252m <sup>2</sup> , the TV lounge 64m <sup>2</sup> , Library 15m <sup>2</sup> , Doctors room 15m <sup>2</sup> , Craft Room 30m <sup>2</sup> .	The occupants of these rooms have access to the main dining/lounge area 252m <sup>2</sup> , the TV lounge 64m <sup>2</sup> , Library 15m <sup>2</sup> , Doctors room 15m <sup>2</sup> , Craft Room 30m <sup>2</sup> .	The occupants of these rooms have access to the main dining/lounge areas of 128m <sup>2</sup> and 157m <sup>2</sup> , the TV lounge 24m <sup>2</sup> , Sunroom 11m <sup>2</sup> , verandas.
Description of any specific accommodation design features of the room, and of the facility, to which a person in this room would have access	N/A	N/A	The area in which these rooms are located forms part of our high and special care wings
<p><b>NOTES: (*1) The Maximum Accommodation Price that a resident can be charged for the room (one set of price information for each room )</b></p> <p><b>(*2) the DAP quoted is correct as at 1 October 2023 with an MPIR of 8.15%</b></p>			



## TIMBREBONGIE HOUSE LTD

### TO LODGE AN APPLICATION FOR PERMANENT ENTRY

1. Read the Information Booklet
2. Complete the Application Form and return to Timbrebongie House together with a current ACAT report (support plan)
3. Calculating the cost of care, for information please refer to the booklet 'Steps to enter an aged care home' – working out the cost. Once read, please determine if forms need to be filled out. This process could take anywhere up to six (6) weeks, ensure appropriate forms are sent to the Department for processing ASAP.

**(Incomplete or unsigned forms will not be accepted)**



## Resident Application Form

Thank you for your Interest in admission into an Timbrebongie Aged Care residence. To be considered for admission and/or added to the wait list at your desired Timbrebongie Aged Care residence(s) we require you to submit the following:

- Timbrebongie Application for Admission (this form).  
Please note all fields must be completed to the best of knowledge and the declaration on page 5 must be signed for the application to be accepted and processed.
- A copy of the ACAT/Support Plan or Residential Referral Code.  
Please make sure you have the correct approvals for the service you are applying for (Residential Respite or Residential Permanent Care)
- If in place; copies of the Enduring Power of Attorney, Guardianship or Administration orders.

All information provided will be treated as highly confidential and accessible only to Timbrebongie.

Which residence(s) would you like to apply for?

1) **Aged Care - Low**

**Aged Care - High**

**Independent Living Unit**

What type of care are you applying for?

- Permanent Care     Respite Care     Dementia Specific     Waitlisting for future needs

Date of Respite:  to  (if applicable)

Following Respite do you have intentions of staying for permanent care?  Yes  No

### Applicants Details

Mr  Mrs  Ms  Miss  Other:  Surname:

Given Name(s):  Preferred Name:

Phone Number:

Date of Birth:  /  /  Gender:  Male  Female  Other/unspecified

Marital Status:  Married  De-facto/partner  Single  Widowed  Separated  Divorced

Home address (not hospital or TCP):

Own Home  Rental  Retirement Village  Other, please specify:

## Cultural Information

Country of Birth:   Aboriginal  Torres Strait Islander  
Language(s) Spoken:  Interpreter Required:  Yes  No

## Pension Details

Australian Pension Number:   
Status:  Full Pension  Part Pension  No Pension Type:  Aged  Disability  Other  
Received From:  Centrelink  DVA, if DVA:  Red  Blue  Gold  White  
Do you receive an overseas pension?  No  Yes, Country:

## Medicare and Health Fund Details

Medicare Number:   
Reference Number:  Expiry Date:   
Do you have private health insurance?  No  Yes, Fund Name:   
Member Number:  Cover:  Hospital  Extras  Ambulance

## Current General Practitioner Details

Please provide the details of your current GP. When entering an **Timbrebongie** Residence as a permanent resident, you will have the choice to be under the care of one of the visiting GP's that service the residents living there.

Practice Name:  Name of Doctor:   
Phone Number:  Email:   
Fax:  Has your GP agreed to visit you?  Yes  No

## Electoral Roll Status

Are you on the electoral roll?  Yes  No

## Where did you hear about us?

Hospital/social worker  Website  Word of mouth  My aged care  
 Aged Care Guide  Signage  Placement Consultant  GP/Medical Practice  
 Financial Planner  Newspaper  Other, please specify:



### Primary Contact

Surname:  Given Name(s):

Address:  Post Code:

Phone Number:  2<sup>nd</sup> Phone Number (if applicable):

Email:  Relationship to applicant:

Enduring Power of Attorney (EPA)  Enduring Power of Guardianship (EPG)

### Secondary Contact

Surname:  Given Name(s):

Address:  Post Code:

Phone Number:  2<sup>nd</sup> Phone Number (if applicable):

Email:  Relationship to applicant:

Enduring Power of Attorney (EPA)  Enduring Power of Guardianship (EPG)

### Other Contact (optional)

Surname:  Given Name(s):

Address:  Post Code:

Phone Number:  2<sup>nd</sup> Phone Number (if applicable):

Email:

Relationship to applicant:

### Contact Information

Who will be responsible for finances? (This person will receive all billing correspondence)

Primary Contact  Secondary Contact  Applicant  Other Contact

Following admission where is mail received for the applicant to go?

Primary Contact  Secondary Contact  Applicant  Other Contact

Who Is to be contacted in relation to this application?

Primary Contact  Secondary Contact  Applicant  Other Contact

Are any of the following in place?

State Administrative Tribunal (SAT) Order  Public Trustee  Public Guardian

## Income, Assets, Debts

**Important:** If you have a spouse, partner or you are in a de-facto relationship the following information provided **must be the combined total of both individuals** even if held in separate accounts or solely owned.

Please provide the following information to the best of your knowledge.

Type Of Income	Annual Amount
Income support from the Australian Government e.g. Aged Pension	\$
War Widow/Widower Pension or Disability Pension	\$
Overseas Pension(s)	\$
Superannuation Income Stream	\$
Income from Rental Properties (show property value under other assets)	\$
Income from Business(s)	\$
Income from Family Trust	\$
Dividends from Private Company Shares	\$
Other Income (do not include bank interest) Source: <input type="text"/>	\$
<b>Total Income Per Annum</b>	<b>\$</b>

Assets	
Principal Home (estimated market value)	\$

Financial Assets	
Cash at Bank	\$
Term Deposits	\$
Stocks / Shares	\$
Managed Investments (superannuation balance if <b>not</b> commenced income stream)	\$
Gifted Assets (if you have gifted assets above \$10,000 in the last financial year or \$30,000 in the last five financial years include the amount above these limits as a financial asset)	\$
<b>Total Amount</b>	<b>\$</b>

Other Assets	
Household Contents (typically \$10k) e.g. Car, Caravan ect.	\$
Superannuation Balance (if commenced income stream)	\$
Investment/additional Properties	\$
Refundable Accommodation Deposits/Contributions	\$
Other Assets Please provide detail: <input type="text"/>	\$
<b>Total Amount</b>	<b>\$</b>

Debts	
Loan, mortgage, or encumbrance held over "Other Assets"	\$
Mortgage over Principal Home	\$

Notes:

## Funding Questions

Please provide the following details, this information allows **Timbrebongie** to accurately advise you what fees may be applicable to you for permanent and/or respite care.

1. Do you have ACAT approval for the service you are applying for? (Residential respite or permanent care)

Yes, referral code: -  (or attach copy)  No, I wish to enter un-funded

2. Are you seeking a transfer from another Aged Care Facility, where you have been a permanent resident?

No  Yes, date of admission:  RAD/Bond Paid:

3. Have you had any respite care this financial year (since 1<sup>st</sup> of July)?

No  Yes, Dates:  to  or  days.

4. Do you have a friend or family member that has been living with you as your carer and receiving a carers pension for the past 2 years?

No  Yes, Name:  Relationship:

5. Have you owned a house or property in the past 5 years?

Yes  No

6. Have you submitted your Centrelink/DVA income and assets assessment? (Permanent care only)

Yes, please attach a copy of the outcome letter to this application.  No

If not do you intend to do so?  Yes

No, I have been advised by **Services Australia** I do not require to submit one as I am on a means tested pension and do not own a home or other property

No, I do not wish to disclose my means - I acknowledge I may be charged the maximum means tested care fee (\$259+ per day). Initial:

## Disclaimer

If the information provided to us to calculate your Means Tested Amount is incorrect or altered and it is subsequently determined, by us, that you should pay an Accommodation Payment instead of an Accommodation Contribution, your payments will be reclassified and recalculated, with effect from your date of entry, based on the maximum charges notified at the date of entry and the Method of Calculation. Where a change is notified, this Agreement will be applied accordingly with an appropriate adjustment to be made to your payments within 7 days of our notification in the form of an additional payment to us.

This application was completed by:  Applicant  Applicant's Representative

I declare that the information contained in this Application is to my knowledge true and correct.

Name:  Date:

Relationship to Applicant:  Signature:



# Steps to enter an aged care home



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The document must be attributed as the Department of Health *Steps to enter an aged care home*.

## Contact us

Enquiries regarding the licence and any use of this document are welcome via email at: [agedcarecomms@health.gov.au](mailto:agedcarecomms@health.gov.au)

You can find this product at [myagedcare.gov.au](https://myagedcare.gov.au)

This booklet is designed to help you, your family or your friends make important decisions about your care. Although we have tried to make it as comprehensive as possible, you may want to seek more specific information regarding your individual situation to make an informed decision.

Information is current as at June 2021.



# **Steps to enter an aged care home**



## Is this booklet right for you?

This booklet explains how older people can access care in an aged care home, the process for moving into an aged care home and what to expect when you are there.

You should read this booklet if you have been assessed by an Aged Care Assessment Team (ACAT) member for care in an aged care home.

Otherwise **call My Aged Care on 1800 200 422 or go to [myagedcare.gov.au](http://myagedcare.gov.au)** for information on the assessment process and eligibility for different types of government-funded aged care:

### Short-term restorative care

Short-term care services in the home or residential care settings for situations such as restorative care (return to independence).

### Entry-level support at home

Ongoing or short-term care and support services through the *Commonwealth Home Support Programme* including help with housework, personal care, meals and food preparation, transport, shopping, allied health, social support and planned respite (giving your carer a break).

### More complex support at home

Four levels of consumer directed coordinated packages of services through the *Home Care Packages Program* including personal care, support services and nursing, allied health and clinical services.

### Residential aged care

Personal and nursing care in aged care homes for older people unable to live independently in their own homes. This also includes residential respite for short stays in an aged care home.

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## Care in an aged care home

An aged care home (sometimes known as a nursing home or residential aged care facility) is for older people who can no longer live at home and need ongoing help with everyday tasks or health care.

Living or staying in an aged care home is all about making sure you receive the care you need. Aged care homes can help you with:

- day-to-day tasks (such as cleaning, cooking, laundry)
- personal care (such as bathing, dressing, grooming, going to the toilet)
- clinical care (such as wound care and medication administration) under the supervision of a registered nurse
- other care services.

Residential care in an aged care home can be provided on a permanent or short-term basis. Short-term care in an aged care home is called residential respite care (see page 10).

Aged care homes are owned and operated by people or organisations that have the approval of the Australian Government to care for you. They must meet aged care quality standards.

Privately funded housing options, such as retirement villages or independent living units, offer a range of services for independent older people. They are regulated by state and territory governments and do not require Australian Government approval to operate.

These privately funded services may also be approved to provide Australian Government funded aged care services such as home care packages in their facilities. If eligible, you can choose to receive aged care services from them or from another approved provider.

## Eligibility

You may be eligible for care in an aged care home if you are an older person who can no longer live independently at home.

Some younger people (under 65 years) with exceptional circumstances may be eligible for aged care but this should only be used where there are no more appropriate care services to meet their needs.

If you are under the age of 65 years (a 'younger person') with a permanent and significant disability, you may be eligible for the National Disability Insurance Scheme (NDIS). If you think you may be eligible for the NDIS you can visit the NDIS website at [ndis.gov.au](http://ndis.gov.au) or call 1800 800 110, Monday to Friday, 9am to 5pm AEST.

## Care and services available

Care and services that must be provided to you, if you need them, include:

- Accommodation services such as furnishings, meals, basic toiletries and social activities in the home.
- Personal care assistance such as bathing, eating, help with taking medications and carrying out health treatments.
- Care and services according to your care needs, including:
  - › special bedding materials
  - › mobility goods such as walking frames and wheelchairs (excludes motorised wheelchairs and custom made aids)
  - › incontinence aids
  - › nursing services
  - › medication management
  - › therapy services such as speech therapy, podiatry (foot care) and physiotherapy.

This is not an exhaustive list. You should discuss your needs and preferences with your preferred aged care home.

Some aged care homes have extra service status meaning they offer places with a higher standard of accommodation, greater menu choice and non-care services such as daily newspapers, at an extra cost.

## Contact My Aged Care and have an assessment

If you have not already been assessed for care in an aged care home, including residential respite, you can apply for an assessment online at [myagedcare.gov.au/assessment/apply-online](https://myagedcare.gov.au/assessment/apply-online). By applying online you, or a family member or friend acting on your behalf, can register and complete a referral for assessment quickly and easily, at a time that best suits you.

You can also quickly find out if you meet the requirements for an assessment by using the eligibility checker, at [myagedcare.gov.au/eligibility-checker](https://myagedcare.gov.au/eligibility-checker).

If you prefer, you can apply for an assessment by calling My Aged Care on 1800 200 422. The contact centre staff will ask you questions about your current situation to help them understand your needs and care arrangements to inform the next steps.

You will be asked to provide permission to have a personalised client record created. This will hold up-to-date information on your needs, the results of any assessments and any services that you receive. The client record will reduce the need for you to retell your story.

You can also nominate family and friends as your representatives. They can act as a representative on your behalf to discuss your care needs. More information about appointing a representative is available at [myagedcare.gov.au/appointing-representative](https://myagedcare.gov.au/appointing-representative) and can also be done when applying for an assessment online.

If your care needs show that you might be eligible for care in an aged care home, you will be referred for a free assessment with a member of your local Aged Care Assessment Team (ACAT) (or Aged Care Assessment Service (ACAS) in Victoria).

Your local ACAT member (usually a nurse, social worker or other health care professional) will make a time to come to your home and talk to you about your current situation and assess you for government funded aged care services.

You may feel worried about being assessed by someone you don't know and what the assessment may mean for you. The assessor is trained to talk to people in your situation and will understand how you are feeling. Tell

them honestly about your situation and any concerns you or your family may have.

You are encouraged to have someone else such as a friend, family member or carer with you for your assessment.

If you have concerns about your assessment, try talking to your ACAT assessor or manager in the first instance. If you do not know the ACAT organisation's details, the My Aged Care contact centre can give you this information.

If you cannot first resolve the issue with your ACAT, ask them to give you the contact details of your state or territory government department manager.

If you are under 65 years of age, ACAT assessors must first test with the National Disability Insurance Agency whether you can be assisted by the NDIS. This is required before approval of any younger person for aged care.



## Outcome of your assessment

After your assessment, an assessor will make a formal decision about your care needs. If you are assessed as eligible for entry into an aged care home, you will receive an approval letter and support plan from your ACAT that sets out the care you are approved to receive. The support plan will include a unique referral code that you give to your chosen provider if and when you choose to go into an aged care home. Decisions about entering an aged care home must be made with your agreement.

If you are not approved for entry into an aged care home, you will receive a letter stating why and who to contact for more help. You may be eligible for other care and services and if so, this information will be included with your letter.

If your care needs change at any time, you can ask for a new assessment by calling My Aged Care.

If you don't receive an approval letter explaining your assessment decision, you should first contact your ACAT or call My Aged Care and ask for a copy.



## Concerns about the outcome of your assessment

The letter you receive from the ACAT will include further information about how you can make a complaint or appeal the decision.

If you do not agree with the assessment outcome in your letter or want to discuss any concerns about the decision, you should first contact your ACAT.

If, after you have spoken to your assessor, you still do not agree with your assessment outcome, you can ask for a review of the decision by writing to the Secretary of the Department of Health outlining why you think it should be changed.

You should write to the following address:

The Secretary  
Department of Health  
Attn: Aged Care Assessment Program Reconsiderations  
GPO Box 9848  
Adelaide SA 5001

You must write to the Secretary within 28 days of receiving your letter.

There is no charge to ask for a review of an ACAT decision. If you are not satisfied with the outcome of this review, you can go to the Administrative Appeals Tribunal. There is a charge for this. Find out more on their website at [aat.gov.au](http://aat.gov.au) or call 1800 228 333.



## Residential respite care (short stays in aged care homes)

If your carers at home are unable to care for you for some reason, or you would like a break from caring for yourself, you may be able to have a short stay in an aged care home. This is called 'residential respite care', and can be sought on a planned or emergency basis.

### Care available

An aged care home may provide a range of care and services, depending on your needs. These should be the same as what you would receive if you moved into the home permanently.

You can access residential respite for up to 63 days each financial year. You or your provider can ask to extend this time in lots of 21 days by contacting your local ACAT.

### Access to residential respite care

You will need an ACAT assessment for respite in an aged care home. The availability of services varies from region to region, and the assessment will determine your needs in line with what help is available in your area.

If you need emergency respite care, phone your local Commonwealth Respite and Carelink Centre on 1800 052 222 during business hours or 1800 059 059 outside business hours.

See also **residential respite care costs** on page 18.

# Pathway to accessing care in an aged care home

This booklet outlines the usual pathway after you have had an assessment and received a letter to say that you are approved for residential care, so you can enter an aged care home and manage your services:

- 1 Work out the costs**
- 2 Find an aged care home**
- 3 Apply to an aged care home and accept an offer**
- 4 Enter into agreements with your aged care home**
- 5 Manage your care and services**

## Help accessing aged care services

If you need extra assistance, an advocate can support you to access Australian Government funded aged care services. Advocacy services can give you information about your rights and responsibilities when accessing aged care services.

Advocacy services are free, confidential and independent. Call the Older Persons Advocacy Network (OPAN) on 1800 700 600 to find out more about advocacy services.

# 1 Work out the costs



The Australian Government subsidises aged care homes to keep costs reasonable and affordable. Subsidies based on your care needs are paid directly to the home.

On average, the Australian Government contributes about \$70,700 yearly for each permanent aged care home resident. This amount increases each year.

If you are eligible, you are expected to contribute to the cost of your accommodation and care if you can afford to do so.

To get an estimate of your fees, use the fee estimator on the My Aged Care website at [myagedcare.gov.au/how-much-will-i-pay](https://myagedcare.gov.au/how-much-will-i-pay)

## Costs you may need to pay

There are various fees you may be asked to pay including:

- **basic daily fee**

This covers daily living costs such as meals, power and laundry. Everyone pays this fee and for some people, this is the only fee they need to pay.

The Department of Veterans' Affairs (DVA) will pay the basic daily fee for eligible former Prisoners Of War (POW) and Victoria Cross (VC) recipients.

- **means-tested care fee**

If your income and assets are over a certain amount, you can be asked to contribute towards the cost of your care. Services Australia or DVA will tell you if you need to pay this fee and the amount will be based on your means assessment.

Eligible former POWs and VC recipients are exempt from paying a means-tested care fee.

- **accommodation costs**

This is for your accommodation in the home. Some people will have their accommodation costs paid in full or in part by the Australian Government, while others will need to pay the accommodation price agreed with the aged care home. Services Australia will tell you which applies to you based on your means assessment.

- **extra service fees**

Some homes have extra service status which allows them to offer a higher standard of accommodation, food and services, at an additional cost. If you agree to an extra service room, extra service fees will apply.

You should ask your provider if they have extra service status and if they charge this fee. Extra service fees are set by the aged care home and can only be charged if you have agreed to them. They are **not** subsidised by the government.

- **additional service fees**

You may also choose to pay for additional services, which go beyond the care and services which your aged care home must provide.

Some homes allow you to choose what additional services you would like, so you only pay for what you use. Others provide a package of additional services, and some of them must be agreed to as a condition of living in the home. Fees for additional services are set by the provider and are **not** subsidised by the government.

You and your provider must agree on a fee for additional services before you start receiving them, but you can only be charged for additional services that you can make use of or benefit from.

Additional services and additional service fees vary from home to home so check with your aged care home for details of these services and the fees that apply.

Fees are payable for every day you are in an aged care home. These are calculated daily but generally paid fortnightly or monthly to the aged care home.

## Arrange your financial assessment

You will need a means assessment to work out if you are eligible for government assistance with your accommodation costs and if you need to pay a means-tested care fee. How much you pay depends on the result of this means assessment.

### **You should arrange for a means assessment as soon as possible as this process may take time.**

Assessments are undertaken by Services Australia, except for eligible members of the veteran community whose assessment may be undertaken by DVA.

If you receive a means tested payment from Centrelink or DVA and you don't own your home, you do not need to fill in a means assessment form. Services Australia already have enough information to complete your means assessment.

For everyone else, you can complete your means assessment online by using the *Aged Care Calculation of your cost of care (SA486)* form.

This form will present different questions based on the answers you give. You can find it on the Services Australia website at [servicesaustralia.gov.au/individuals/forms/sa486](https://servicesaustralia.gov.au/individuals/forms/sa486)

If you prefer to complete a hardcopy form, you are still able to do so:

- If you receive a means tested payment from Centrelink or DVA and you own or part own your home, complete the *Residential Aged Care Property details for Centrelink and DVA customers (SA485)* form.
- If you do not receive a means tested payment from Centrelink or DVA, complete the *Residential Aged Care Calculation of your cost of care (SA457)* form.

You can get these forms by requesting a copy from Services Australia on 1800 227 475, or downloading them from the Services Australia website at [servicesaustralia.gov.au/individuals/forms/sa486](https://servicesaustralia.gov.au/individuals/forms/sa486)

Further details about these forms and when to use them are provided on the forms themselves.

If you do not complete a means assessment, you won't be eligible for government assistance with your accommodation and care costs. The aged care home can then ask you to pay the maximum means-tested care fee and an accommodation payment (up to their published maximum room price). You can use the Income and means assessments tool on the My Aged Care website to confirm if you should complete a means assessment for aged care: [www.myagedcare.gov.au/income-and-means-assessments](http://www.myagedcare.gov.au/income-and-means-assessments)

To check the status of your means assessment you can call Services Australia on 1800 227 475 or DVA on 1800 555 254.

### Fee advice letter

If you get a means assessment before moving into an aged care home, you will receive a letter about the maximum means-tested care fees you can be asked to pay. The advice will be valid for 120 days – unless there is a significant change in your circumstances. If there is a change in your circumstances, you will need to notify Services Australia or DVA who will reissue your fee advice letter.

If you do not need to complete a means assessment because Services Australia already have your financial information, you will receive a fee advice letter once you enter your aged care home. If you require the letter before you enter care, you can request one by calling Services Australia on 1800 227 475 or DVA on 1800 555 254.

Take your fee advice letter with you to any discussions that you have with potential aged care homes to help you understand the cost of living in their home.

Once you have moved in, Services Australia will send you and your aged care home a letter outlining the maximum fees you may be asked to pay.

Services Australia will send you and your aged care home a letter each time there is a significant change to your means-tested care fee or accommodation contribution.

## Accommodation costs

The amount you can be asked to pay for your accommodation is based on your means assessment and will be one of the following:

- No accommodation costs: for some people, the Australian Government will pay all of your accommodation costs.
- An **accommodation contribution**: if you need to pay for part of your accommodation, the Australian Government will pay the rest.
- An **accommodation payment**: if you need to pay for the full cost of your accommodation, you will need to negotiate a room price with your provider.

Services Australia will advise which applies to you.

Whether you have to pay towards your accommodation or not, everyone entering an aged care home needs to agree a room price in writing with their aged care home (up to the published maximum room price on My Aged Care). The room price you agree to must be included in the accommodation agreement given to you before you move in.

All aged care homes that charge an accommodation payment are required to publish their accommodation costs on the My Aged Care website in the aged care homes 'Find a provider' tool: [myagedcare.gov.au/find-a-provider](https://myagedcare.gov.au/find-a-provider)

The advertised room price is the maximum price the aged care home can ask you to pay. However, you may be able to negotiate a lower price directly with the aged care home.

## Payment options

If you are required to pay an accommodation contribution or an accommodation payment, you have 28 days from the day you move into the home to decide on your payment method. You can choose to pay your accommodation costs by:

- a lump-sum refundable accommodation deposit (RAD) or refundable accommodation contribution (RAC)
- rental-style payments called a daily accommodation payment (DAP) or daily accommodation contribution (DAC)
- a combination of both lump-sum and rental-style payments.

You must pay your accommodation costs by the rental-style payment method until you decide how you want to pay for your accommodation.

If you choose to pay an amount as a lump sum, the balance is refunded when you leave the home.

If you choose a combination payment, you can choose to draw your daily payment from your paid lump sum. Over time, this will increase your daily payment unless you top up the lump sum. Your provider may also agree to draw other aged care fees from the lump sum, like the basic daily fee.

If you have been asked to make an accommodation contribution, the maximum amount you can be asked to pay will be advised by Services Australia.

More information about accommodation costs is available on the My Aged Care website: [myagedcare.gov.au/understanding-aged-care-home-accommodation-costs](https://myagedcare.gov.au/understanding-aged-care-home-accommodation-costs)



## Residential respite care costs

You do not have to complete a means assessment to access residential respite care. If you receive residential respite care through an aged care home, you won't have to pay any accommodation costs or means-tested care fees.

You can expect to pay a basic daily fee and perhaps a booking fee.

DVA may pay the basic daily fee for eligible veterans and war widows/widowers. Contact Veterans' Home Care for an assessment by calling 1300 550 450.

The booking fee is a pre-payment of residential respite care fees and cannot be more than either a full week's fees, or 25% of the fees for the entire stay, depending on which amount is the lowest.

Your provider must refund your booking fee if you cancel your respite care booking more than 7 days before your entry date.

You may also be asked to pay for additional care and services if you agree to receive these, or be charged an extra service fee if you agree to stay in an extra service room.

Once your Government-funded days of respite care have been exhausted, and if you remain in care, your provider may charge you an additional amount. This needs to be agreed to beforehand and outlined in your resident agreement.

## Financial hardship assistance

Help is available if you are having difficulty paying your care and accommodation costs for reasons beyond your control. Financial hardship assistance is available to help you with these costs. Depending on your personal situation, you may apply for financial assistance with your basic daily fee, means-tested care fee and/or accommodation costs.

More information about financial hardship assistance is available on the My Aged Care website, including how you can apply. Or you can call Services Australia on 1800 227 475.

## Financial information and education

It is a good idea to seek independent financial advice before deciding how to pay for your aged care. Some payment methods may affect your pension and aged care fees. Also, if both you and your partner need access to aged care, each of your payment methods may impact the other's aged care fees.

You can get basic information about managing your finances from the Services Australia Financial Information Service. This free confidential service can help you make informed decisions about investment and financial issues for your current and future needs.

For more information about the Financial Information Service, call Services Australia on 132 300 and say 'financial information service' when asked why you are calling.



## 2 Find an aged care home

When deciding on an aged care home, it is important to find out if the home has the care and services you need, now and into the future. The best way to find a place that suits you is to visit a few different homes to check:

- what the accommodation is like
- what types of care, services and activities they offer
- how they can best meet your individual needs
- the fees you may need to pay for care and services
- accommodation prices
- any additional services they offer.

Find providers in your local area with help from your assessor, by using the aged care homes 'Find a provider' tool [myagedcare.gov.au/find-a-provider](http://myagedcare.gov.au/find-a-provider), or calling My Aged Care on 1800 200 422. You can then contact them to arrange a time to visit.

### Meet providers

Before you visit any aged care homes, it's a good idea to make a list of the things that are important to you. You may want to take your:

- letter and referral code details from the ACAT assessor, as some homes will want to know that you have been approved to receive residential care and what services you need
- fee advice letter from Services Australia, if you already have the outcome of a financial assessment.

As you visit each home, you may also want to make notes about what you like, what you don't like and if you feel comfortable there. Your impressions of the staff and the environment will help you make a decision about which home is right for you.

Use the checklist at the back of this booklet to help you research and find providers that best meet your needs.

## Questions you can ask providers:

- What type of care services are and are not provided? What services will I need to pay for?
- Can you help me with my medical needs such as help with taking medication or wound care?
- Can you meet my individual needs? These may include language and culture, religious beliefs, sexuality or gender identity, pets and access to medical visits.
- What are the meal arrangements? These include seating, times, menus, visitors, meals in your room and special diets.
- How do you ensure my privacy and safety?
- How are social and cultural activities decided? How are my interests taken into account?
- What transport can I access for visiting shops, family and friends or medical appointments? How much will this cost?
- What training do the care staff have? Will I have access to qualified nurses if and when I need them?
- How many staff provide care overnight?
- How can my partner, family and friends be involved in my care? Can they stay overnight if needed? What if I want to stay with family members overnight?
- Can you arrange appointments and access to health services? Can I continue to see my own GP and other health practitioners?
- What checks are in place to ensure quality services?
- How did the home perform in its accreditation audit?
- What are you doing to improve the quality of care and services?
- What areas are you working on improving and what results have you seen?
- How do you involve older people, their families and carers in decisions or making quality improvements?
- Will I ever be asked to leave the aged care home or change rooms?

## 3 Apply to an aged care home and accept an offer

As you find aged care homes that meet your needs, you can start applying for a place. You can apply to as many homes as you like. It is a good idea to apply to a number of homes as your preferred home may not have a place available when you are looking. When a place becomes available, the aged care home will contact you or your nominated contact person.

### Fill in an application form

All aged care homes have their own application process and may ask you to fill in a form. Talk to the homes you are interested in and find out what process they have and what information they need.

You will need to give the unique referral code you received from your ACAT to your chosen provider/s. This will allow them to view your client record and consider your care needs to help you enter an aged care home.

### Accept an offer

When a place becomes available, the aged care home will contact you or your nominated contact person. Once you have accepted an offer of a place in an aged care home, the home will offer you formal agreements that cover things like services, accommodation costs, and your rights and responsibilities as a consumer of Australian Government funded aged care services.

Use the checklist at the back of this booklet to prepare for your move. This includes organising your medical and financial matters, and who you'll need to tell about your move.

## 4 Enter into agreements with your aged care home

After accepting a place and before moving in, your aged care home must offer you a **resident agreement**.

You will also be offered an **accommodation agreement** with the home before you enter care and it may be included as part of your resident agreement or it may be a separate document.

The resident agreement and accommodation agreement are legally binding documents between you and your aged care home. They set out:

- the care and services available
- what fees and accommodation costs you will have to pay
- how fees and accommodation costs can be paid
- your rights and responsibilities.

It's important that you understand everything in these agreements before you agree to them. If you have any questions, you should ask your new aged care home. It is their responsibility to make sure the agreements offered to you are clear.

The proposed agreements may not include all the things that you think are important, so it is a good idea to check before you agree. You can also ask:

- your provider for extra information, such as the home's meal and visitor policy, and other details about living in the home
- your family, friends, carer, financial advisor or a legal professional to help you understand the terms of your agreements
- to get help from an advocate. Call OPAN on 1800 700 600.

Use the checklist at the back of the booklet to help you negotiate your agreements with your preferred provider.

## Help negotiating your care and accommodation costs

You can ask someone to negotiate with the aged care provider about your fees and agreed room price on your behalf.

You or the person helping you will need to discuss and formally agree to the room price and fees with your aged care home before you enter. Once you are in care, you or the person helping you will decide how you want to pay your accommodation costs.

## Signing the agreements

There is no time limit or requirement for you to agree to the resident agreement. It is, however, in your best interest to agree to the arrangement that covers your rights and responsibilities as soon as you can.

You have 28 days after moving into your aged care home to decide how you want to pay your accommodation costs and enter into an accommodation agreement. You must pay for your accommodation by the rental-style payment until you have made this decision.

If you choose not to sign this agreement, the aged care home still needs to talk to you about your needs and document your reasons for not signing. You can still move in, but this conversation is a verbal agreement of the type of care and services you will get and what fees will apply. You will still need to pay your daily fees and any relevant accommodation costs when you move in.

## Your rights

The Charter of Aged Care Rights sets out your rights as a person living in an aged care home. Your provider must comply with the Charter and respect your rights.

Your provider must help you to understand your rights under the Charter and give you a copy of it before or when you start receiving aged care. Your provider must sign the Charter and also give you (or your representative) the option of signing it. This is in addition to your aged care agreement. By signing the Charter, you acknowledge you have received it, been assisted to understand it and understand your rights. You don't have to sign the Charter; you can begin to receive care and services even if you do not sign it. More information about the Charter is available on the My Aged Care website at [myagedcare.gov.au](http://myagedcare.gov.au).

### Visiting your doctor, dentist or specialist

You can keep your own doctor, dentist or specialist. Your aged care home must help you make appointments and access doctors or specialists of your choice if needed. You do not have to pay the home for arranging these appointments. You will, however, generally need to pay the consultation fee.

Your aged care home can also help you arrange transport to and from your medical appointments. You may have to pay for the transport and for a staff member to accompany you.

### Social activities

Your aged care home will organise social and other activities. Let them know about your hobbies and interests so they can help you continue with them while you are in the home. They might also be able to suggest other things to try.

### Community visitors

If you are feeling alone and don't have regular contact with family or friends, the Community Visitors Scheme (CVS) can provide opportunities for social contact.

If you would like a community visitor, you can let your aged care home know. Your family and friends can also let the home know if they think you would benefit from the CVS. Your aged care home may also approach the CVS directly.

Visit the Department of Health website ([health.gov.au](http://health.gov.au)) and search for "CVS Network Members" for contact details in your state or territory or call My Aged Care on 1800 200 422. There is also a CVS to support the needs of LGBTIQ+ elders.



## Taking leave

### Can I go on holiday?

If you want to go on a holiday or visit family and friends you can use up to 52 nights of social leave from your aged care home in a financial year. You will still have to pay your usual fees and accommodation costs.

If you stay away for more than 52 nights in a financial year, the Australian Government will stop paying subsidies and your aged care home might ask you to make up the amount.



### What if I need to go to hospital?

If you need to go to hospital, the time away won't count towards your social leave, but you'll still have to pay your usual fees and accommodation costs. The fees may reduce with an extended hospital stay.

### Changing rooms

If you are satisfied with your aged care home but want to change rooms, you can ask the manager of your home. They must consider your request, even if it isn't possible to offer you another room straight away.

You may need to negotiate a new accommodation agreement and accommodation price if you change rooms, for example, if you choose to move from a shared room to a single room. You may also be asked to pay extra service fees associated with the new room.

### Can the home make me change rooms?

There are circumstances where you could be moved to another room without you asking for the change. If you have any concerns about being asked to change rooms or how your move is being handled, talk to the manager at your aged care home.

### Raising your concerns

If you are unhappy about the care or services you receive, you have the right to raise your concerns:

- It is often best to talk to your service provider about your complaint first to see if they can help as it may be something that can be easily resolved.
- If you like, you can have a family member, friend, carer or an aged care advocate with you when you meet with your aged care service provider.

If the complaint can't be resolved by the service provider, or you don't feel comfortable raising your concern with them, you can raise your concern with the **Aged Care Quality and Safety Commission**.

This is a free service and you can contact them by:

**Phone** – 1800 951 822

**Email** – [info@agedcarequality.gov.au](mailto:info@agedcarequality.gov.au)

**Online** – [agedcarequality.gov.au](http://agedcarequality.gov.au)

**In writing** – address your written complaint to:

Aged Care Quality and Safety Commission  
GPO Box 9819  
(Your capital city and state/territory)

## Further assistance

### Translation and interpreting services

If you speak a language other than English, you can call the Translating and Interpreting Service (TIS National) for the cost of a local call on 131 450. TIS National covers more than 100 languages. Call and tell the operator the language you speak and ask for My Aged Care on 1800 200 422.

### Help for people with hearing or speech difficulties

Contact My Aged Care through the National Relay Service (NRS). For more information, visit the NRS website ([communications.gov.au/accesshub/nrs](https://communications.gov.au/accesshub/nrs)) to choose your preferred access point or call the NRS Helpdesk on 1800 555 660.

### Help for people with diverse needs

There are programs, information and support for older Australians of all backgrounds including:

- Aboriginal and Torres Strait Islander people(s)
- people from culturally or linguistically diverse backgrounds
- people who live in a rural and remote area
- people who are financially or socially disadvantaged
- veterans, their dependants and widows or widowers
- people who are homeless or at risk of becoming homeless
- people who are lesbian, gay, bisexual, transgender or intersex
- people who are Care Leavers (an adult who spent time in institutional or foster care as a child)
- parents separated from their children by forced adoption or removal.

Knowing about your individual needs helps your provider deliver care and support that is appropriate and respectful of your diversity.

## Help for people about elder abuse

If you witness, suspect, or experience elder abuse, call the National Elder Abuse phone line for free and confidential information, support, and referrals.

Call 1800 ELDERHelp (1800 353 374).

Elder abuse may involve physical harm, misuse of your money, sexual abuse, emotional abuse or neglect.

You can also visit the COMPASS website at [compass.info](http://compass.info) for information, a support directory and resources about elder abuse.

## Help for carers

If your carer needs additional support, contact the Carer Gateway on 1800 422 737 or go to [carergateway.gov.au](http://carergateway.gov.au) to find out more about services to support carers.

## More information

Visit the My Aged Care website ([myagedcare.gov.au](http://myagedcare.gov.au)) for more detailed information including additional information on costs.

## Call costs

**13/1300 numbers** – Charges for calls to 13/1300 numbers from landline and mobile phones are different. Calls to 13/1300 numbers from a fixed landline are charged at a cost similar to a local call. Calls from mobile phones may incur a higher charge.

**1800 numbers** – Calls to 1800 numbers are free from fixed landlines and most Australian mobile phone providers now offer free calls to 1800 numbers – check with your mobile phone provider.

# Checklist - Work out the costs and find an aged care home

Use this checklist to help work out what you may need to pay towards the cost of your care and accommodation and find a provider that meets your needs.

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## Following your assessment

- receive approval letter and support plan from your ACAT.

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## Estimate costs

- estimate costs using the fee estimator for aged care homes on the My Aged Care website: [myagedcare.gov.au/how-much-will-i-pay](http://myagedcare.gov.au/how-much-will-i-pay)

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## Arrange a financial assessment early

- if you receive a means tested payment from Centrelink or DVA and you don't own your home, you do not need to fill in a means assessment form. If you need a fee advice letter before you enter the aged care home, you can request one by calling Services Australia on 1800 227 475 or DVA on 1800 555 254.
- everyone else should complete the online *Aged Care Calculation of your cost of care (SA486)* form on the Services Australia website: [servicesaustralia.gov.au/individuals/forms/sa486](http://servicesaustralia.gov.au/individuals/forms/sa486), or
- you can use a hardcopy form by downloading one from the link above or by calling Services Australia or DVA to request one:
  - › *Residential Aged Care Property details for Centrelink and DVA customers (SA485) form*
  - › *Residential Aged Care Calculation of your cost of care (SA457) form*
- submit the means assessment form to Services Australia or DVA
- let Services Australia or DVA know if there is a change to your financial situation and they will reissue your fee advice letter

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## Supports

- you can appoint someone to act on your behalf with Services Australia at the same time as you complete your means assessment. If you have chosen not to complete a means assessment you can complete an *Authorising a person or organisation to enquire or act on your behalf*

(SS313) form instead. DVA customers should use the *Aged Care Request for a nominee for DVA customers (AC019)* form.

- you may wish to seek financial advice before deciding how to pay your fees and accommodation costs. You can contact Services Australia's free Financial Information Service on 132 300 and say 'financial information service' when asked why you are calling.

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### **Short-list the aged care homes you are interested in**

- use the 'Find a provider' tool on the My Aged Care website [myagedcare.gov.au/find-a-provider](http://myagedcare.gov.au/find-a-provider)
- call My Aged Care on 1800 200 422 to find aged care homes in your area
- use the 'fee estimator' on the My Aged Care website to give you an idea of accommodation costs.

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### **Contact/visit your preferred aged care homes to discuss what they offer and their costs**

- take your approval letter from your ACAT
- take your fee advice letter from Services Australia with you
- **Note:** If you have not already arranged for a means assessment, call Services Australia on 1800 227 475 or DVA on 1800 555 254.
- list what's important to you and questions to ask
- make notes on each home you visit e.g. what you like/don't like and impressions of the staff and the environment
- ask about fees and accommodation costs
- ask if they offer extra service rooms and ask about their costs
- ask about additional services they offer and their costs
- apply for a place in the home/s you like using the aged care home's application form.

## Checklist – Enter into agreements

Once you have accepted an offer of a place in an aged care home, the home will offer you a resident agreement, an accommodation agreement and an extra service agreement (if applicable). These may be combined into a single agreement.

You can ask someone to negotiate with the aged care provider about your fees and accommodation costs on your behalf. You can include this nominated person in your resident agreement.

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### **Agree on a room price in writing before you enter the home.**

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#### **Check that your resident agreement includes:**

- the name of your aged care home
- the care and services that the home will provide
- the policies and practices used to set your fees and accommodation costs
- the daily fee you'll be asked to pay
- the means-tested care fee if applicable
- any additional service fees for other optional care or services you have agreed to (in addition to those that the home must provide to you based on your care needs)
- rights and responsibilities of residents and the aged care home
- how the aged care home handles complaints
- any circumstances where you might be asked to leave and how the aged care home will help you find somewhere else to live
- any other matters agreed between you and the aged care home.

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#### **Check that your accommodation agreement includes:**

- the agreed room price
- other conditions of your accommodation payment or contribution and, if applicable, the circumstances for refunding your lump sum balance if you leave or pass away
- the specific accommodation you will be provided with if you pay an accommodation payment, contribution or neither of these

- any services your accommodation cost covers
- conditions for moving rooms.

You have 28 days after moving into your aged care home to decide how you would like to pay for your accommodation.

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**Check that your extra service agreement (if applicable) includes:**

- details of the higher standard of accommodation, meals and services
- the extra service fees.





# Checklist - Prepare to move

Once you have been offered a place in an aged care home, use this list to check who you should let know about your move.

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## Family and friends

- your family and friends, carer/s and neighbours.
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## Health professionals

- your doctor/GP
    - › *if you need to change doctors, ask to have your medical history sent to your new doctor*
    - › *make a note of your current medical treatments and medication so you can discuss this with your new aged care home as part of your care plan*
  - other health professionals you see regularly e.g. specialists, dentist, etc.
  - your community nurse
  - your pharmacist.
- 

## Help at home support

- your gardener or lawn mowing person
  - your cleaner or home help
  - Meals on Wheels and other support services
  - your home care package provider.
- 

## Government departments and agencies

- Department of Veterans' Affairs (DVA) – 1800 555 254
- Services Australia – 132 300
- Australian Taxation Office – 132 861
- Medicare – 132 011
- your local office of the Australian Electoral Commission
- your local roads and transport authority (for your driver's licence)
- your local post office
- your local council.

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## **Finances and insurance**

- your health insurance company
- your superannuation company
- your bank, building society or credit union.

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## **Other**

- utilities such as phone, gas, electricity and water
- other aged care homes you've applied to, if you no longer wish to move there (although you might choose to keep your application open if you're still interested).



For help visit [myagedcare.gov.au](http://myagedcare.gov.au) or call 1800 200 422  
All information in this publication is correct as at June 2021



# Charter of Aged Care Rights

This booklet informs you of your rights as an aged care consumer and how you can exercise them. It also includes some information about your responsibilities as an aged care consumer.

# **The Charter of Aged Care Rights describes your rights as a consumer of Australian Government funded aged care services**

**From 1 July 2019, a new Charter of Aged Care Rights will provide the same rights to all consumers, regardless of the type of Australian Government funded aged care and services they receive.**

**The Charter of Aged Care Rights is made under the *Aged Care Act 1997*.**

# Charter of Aged Care Rights

## I have the right to:

- 1.** safe and high quality care and services;
- 2.** be treated with dignity and respect;
- 3.** have my identity, culture and diversity valued and supported;
- 4.** live without abuse and neglect;
- 5.** be informed about my care and services in a way I understand;
- 6.** access all information about myself, including information about my rights, care and services;
- 7.** have control over and make choices about my care, and personal and social life, including where the choices involve personal risk;
- 8.** have control over, and make decisions about, the personal aspects of my daily life, financial affairs and possessions;
- 9.** my independence;
- 10.** be listened to and understood;
- 11.** have a person of my choice, including an aged care advocate, support me or speak on my behalf;
- 12.** complain free from reprisal, and to have my complaints dealt with fairly and promptly;
- 13.** personal privacy and to have my personal information protected;
- 14.** exercise my rights without it adversely affecting the way I am treated.

Everybody involved in the delivery of your care must respect your rights.

## **Your aged care rights co-exist with other rights**

People receiving aged care have the same legal rights as all Australians. When you start receiving aged care, you retain the same rights as everyone else in the community. For example, you have rights to privacy, consumer rights and the right to be free from discrimination under relevant laws.

The rights described in the Charter add to these.

## **Aged care providers must help you to understand your rights**

As an aged care consumer, your provider is legally required to help you to understand your rights under the Charter.

A copy of the Charter must be given to you before or when you start receiving aged care. Your provider is required to sign the Charter and to also give you the option of signing it. This is in addition to your aged care agreement.

By signing the Charter, you acknowledge you have received it, been assisted to understand it and understand your rights. You don't have to sign the Charter: you can begin or continue to receive care and services even if you do not sign it.

Your provider is required to give you either an original or a copy of the Charter that has been signed. Both you and your provider should keep a copy.

It is a good idea to share this information with your family, friends or others involved in your care.

## These rights apply in residential care, home care and other aged care services provided in the community

All providers of Australian Government funded aged care must comply with the Charter. This includes providers of residential care, home care, flexible care, and services provided under the Commonwealth Home Support Programme and the National Aboriginal and Torres Strait Islander Flexible Aged Care Program.

## Aged care services from multiple providers

If you receive services from more than one provider, each must comply with the Charter and respect your rights. Each provider must sign the Charter, help you to understand it and give you the option of signing it.

### Case Study

**Winni is receiving Commonwealth Home Support Programme services from three different service providers: one for home cleaning, one for twice-yearly gutter cleaning and a third for community transport services. Each provider will sign the Charter, offer it to Winni to sign and give her a copy.**







## **Your aged care provider may engage contractors or other people to help deliver your care and services**

People from organisations other than your aged care provider may be involved in delivering your aged care services.

Many aged care providers use contractors to deliver aged care services or subcontracted services through other organisations.

Everybody involved in the delivery of your care must respect your rights.

### **Case Study**

**Lei is receiving aged care services through the Commonwealth Home Support Programme. These services include help with maintaining the garden and cleaning the house. The aged care provider, Home Care Deluxe, engages another organisation, Kim's Mowing, to look after Lei's garden. All staff from Kim's Mowing must respect Lei's rights.**

## **You should expect to feel safe, always**

You have a right to live without abuse and neglect. You should feel safe, whether you are receiving residential aged care, services in your own home, or other aged care services in the community.

If you are made to feel unsafe or uncomfortable, you should tell someone. This could be your aged care provider, a staff member, a friend, family member, an aged care advocate or anyone you trust.

You should expect the care and services you get to be safe, and you should feel able to share any concerns with your aged care provider.

In relation to the care and services provided, your aged care provider must take all reasonable steps to prevent and respond to all forms of violence, exploitation, discrimination, neglect and abuse.

### **Case Study**

**Jarra lives in a residential aged care service. Sometimes another resident in the aged care service shows aggressive and unpredictable behaviour that frightens Jarra. Jarra's family was concerned and spoke with the aged care provider, who worked with Jarra, the family and the other resident to find ways to make them feel safe and comfortable.**





## **If you are concerned that your rights are not being met, you can seek support**

If you have concerns about the care you or someone else is receiving, it is important that you talk about it. You should talk to your aged care provider first.

It's okay to complain. Just as positive feedback can reinforce things that work well, your complaints help improve care and services. You have the right to raise concerns easily and without fear of how you will be treated.

All aged care providers must have their own complaints systems and manage complaints fairly.

Your complaints should be taken seriously and handled fairly and in a timely way. It is your aged care provider's responsibility to act promptly on matters related to the quality or safety of your care and services.

But if you feel uncomfortable talking to your aged care provider, or would like help understanding your rights, services are available to help you.

## You have the right to an aged care advocate

An advocate can help you explore options and make informed decisions. They can also help you to raise your concerns and work towards resolving them.

- Call the National Aged Care Advocacy Line on **1800 700 600** (free call)
- Visit the Older Persons Advocacy Network website **opan.com.au**

## Contact the Aged Care Quality and Safety Commission

The Commission's role is to protect and enhance the health, safety, well-being and quality of life for aged care consumers. It can help you to resolve a complaint about an aged care provider.

- Call the Commission on **1800 951 822**
- Email **info@agedcarequality.gov.au**
- Visit the website **agedcarequality.gov.au**

## As an aged care consumer you have responsibilities

All people involved in aged care – consumers, their families, carers, visitors and the aged care workforce – must respect and be considerate of each other.

You should be mindful of the effect of your behaviour on others, always keeping their rights in mind.

At times, your rights may compete with the rights of other consumers, family members or staff. When this occurs, the consumer and the service provider need to communicate openly and honestly about these competing rights and work together to come to a solution.

### Case Study

**Alex is living in a residential aged care service with many other residents. Alex uses a mobility scooter within the service. However, driving it inside the service has created a hazard for other residents. The provider has worked with Alex to come to an agreement that the scooter will be used outdoors and a walking frame inside the service.**



Good communication between you, your family, friends, carers and staff can help your aged care provider to give you the care and services that best meet your needs.

As an aged care consumer, you should give your aged care provider the information they need to properly deliver your care and services. You should understand and comply with the conditions of your care agreement and pay any fees outlined in the agreement.

You should respect the rights of aged care workers to work in a safe environment. Any kind of violence, harassment or abuse towards staff or others is not acceptable.

Quality aged care outcomes are best achieved in an environment of mutual respect.

## Case Study

**Ashwany is receiving aged care services at home. Bobbi from Brighton Aged Care Services comes to Ashwany's house at 9am every day to help with showering. Ashwany has a doctor's appointment scheduled for 9am next Tuesday. Ashwany has a responsibility to call Brighton Aged Care Services and ask if Bobbi can come at a different time or to cancel services that day.**





## **My responsibilities**

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### **Respect**

**Treat others with respect**

### **Safe environment**

**Respect the rights of staff to work in a safe environment**

### **Information**

**Assist your provider by giving relevant information**

### **Fees**

**Pay agreed fees on time**

## What this means

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All people involved in aged care, including consumers, their family, carers and visitors are expected to be respectful and considerate. They should make sure that their behaviour does not adversely affect others.

Any kind of violence, harassment or abuse towards staff or others is not acceptable.

You are expected to maintain a safe environment for staff members and others. For example, if your provider is delivering services in your home, keep pets away from staff members and do not smoke near staff.

It is important that you share information about yourself that will help providers deliver you safe and quality care.

This may include:

- Up to date information, and
- any problems you have with the provider's care or services.

You are expected to pay any agreed fees on time. If you are unable to pay your fees, talk to your provider to find a solution.

These responsibilities describe expectations of you as an aged care consumer. If you would like information on your legal obligations, talk to your provider.

**You and your aged care provider  
should have reasonable expectations  
of each other**



Your expectations of your aged care provider should be reasonable.

You should discuss your needs, goals, preferences and priorities with your aged care provider. Your aged care provider will work with you on how you can get the care and services you need within the resources available.

## Case Study

**Nic has a Level 2 Home Care Package and gets help with grocery shopping, cleaning and to change a wound dressing from Real Home Support. Nic has asked about some help making meals, but this is not within the current Home Care Package budget. Real Home Support has helped Nic to understand his priorities and what can be provided within his package. They have worked together to revise his care plan to include preparation of meals and limited the cleaning service to enable Nic's priorities to be met within the existing budget.**



# Aged care providers also have other responsibilities

Australian Government funded aged care providers also have other legal responsibilities. These include responsibilities around the fees they charge you and that the care and services they deliver meet the **Aged Care Quality Standards**.

The Aged Care Quality Standards take effect from 1 July 2019. They focus on outcomes for consumers and describe what quality care looks like.

The eight Standards, each relating to an aspect of aged care or services, are:



## Standard 1

Consumer dignity and choice

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## Standard 2

Ongoing assessment and planning with consumers

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## Standard 3

Personal care and clinical care

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## Standard 4

Services and supports for daily living

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## Standard 5

Organisation's service environment

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## Standard 6

Feedback and complaints

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## Standard 7

Human resources

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## Standard 8

Organisational governance

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## If you have concerns about the care you are receiving

- Talk to your aged care provider, in the first instance
- Call the National Aged Care Advocacy Line on **1800 700 600** (free call)
- Visit the Older Persons Advocacy Network website **opan.com.au**
- Contact the Aged Care Quality and Safety Commission on **1800 951 822**.

## If you need an interpreter

- Advise the aged care advocate or the Commission when you call, or call the Translating and Interpreting Service directly on **131 450** and ask them to transfer you.

## If you are hearing or speech impaired

You may wish to make contact through the National Relay Service:

- TTY users: phone **1800 555 677**
- Speak and Listen users: phone **1800 555 727**
- Internet relay users: connect to the National Relay Service and enter the phone number for the advocacy line or the Commission.



## For more information on your rights

### You can:

- Talk to your aged care provider
- Talk to an aged care advocate on **1800 700 600**
- Visit the Older Persons Advocacy Network website **opan.com.au/charter**
- Visit the Department of Health website **agedcare.health.gov.au**
- Visit the Aged Care Quality and Safety Commission website **agedcarequality.gov.au**
- Visit the My Aged Care website **myagedcare.gov.au**.



### Phone

1800 951 822



### Web

[agedcarequality.gov.au](http://agedcarequality.gov.au)



### Write

Aged Care Quality and Safety Commission  
GPO Box 9819,  
In Your Capital City



# What is the SIRS?

## Serious Incident Response Scheme

A fact sheet for aged care consumers

**As an aged care consumer, you have the right to safe and quality care and to live without abuse or neglect.**

The Serious Incident Response Scheme (SIRS) is a new Government initiative to help reduce the risk of abuse and neglect for people living or staying in a residential aged care home.

The scheme requires aged care providers to identify, record, manage, resolve and report all serious incidents that occur, or are alleged or suspected to have occurred, in a residential aged care service.

Underpinning the SIRS is a requirement for residential aged care providers to have in place an effective incident management system – a documented set of protocols, processes and standard operating procedures – to manage all incidents, respond to incidents, and take steps to make sure they do not happen again. The incident management system covers a broader range of non-reportable incidents and include incidents that involve staff or visitors.

### Why is the SIRS important?

The SIRS requires every residential aged care service to adopt a systematic approach to minimising the risk of, and responding to, serious incidents involving residents.

The SIRS underscores the vital importance of an incident management system in helping every residential aged care service to effectively manage risks to their residents.

The SIRS also introduces explicit obligations for providers to report a broader range of serious incidents to the Aged Care Quality and Safety Commission (Commission) than is currently required under compulsory reporting obligations. This includes reports of all incidents that are alleged or suspected to have occurred, or witnessed, between consumers of an aged care service, including where the consumer who commits the incident has a cognitive or mental impairment (such as dementia).

### How will you benefit from the SIRS?

The SIRS will reduce the risk of abuse and neglect for people living in residential aged care homes.

The SIRS and the requirement for providers to have an effective incident management system in place will:

- reduce the chance of you being subject to abuse or neglect in aged care
- help you access support sooner and on an ongoing basis if a serious incident affects you
- reduce the likelihood of the serious incident happening again.

### When will the SIRS commence?

From 1 April 2021, residential aged care providers must report all 'Priority 1' incidents within 24 hours.

'Priority 1' incidents include those that cause or could reasonably have caused physical or



psychological injury or illness requiring some form of medical or psychological treatment. Instances of unexplained absence from care and any unexpected death of a consumer are always to be regarded as 'Priority 1' reportable incidents. From 1 October 2021, all 'Priority 2' incidents - reportable incidents that do not meet the criteria for 'Priority 1' - must also be reported within 30 days.

## How does the SIRS relate to other requirements your aged care provider must meet?

The SIRS will sit alongside, and complement, other requirements that aged care providers must meet.

All providers must comply with the [Aged Care Quality Standards](#) which detail the standards of care a person can expect as an aged care consumer. For example:

### Standard 8 - Organisational Governance

Requires approved providers to have in place effective risk management systems and practices that enable them (among other things) to manage high-impact risks associated with the care of consumers, and to identify and respond to abuse and neglect of consumers.

### Standard 6 - Feedback and Complaints

Requires approved providers to demonstrate that an [open disclosure](#) process is used when things go wrong in providing care for consumers.

A provider is also legally required to help consumers understand their rights under the [Charter of Aged Care Rights](#).

Taken together, the above requirements reinforce the importance of aged care providers having an effective incident management system in place.

## What is an incident management system?

An incident management system is a set of processes and procedures used to prevent, manage and respond to incidents. This system should support an aged care

provider and their staff to take appropriate action when there is an alleged, suspected or witnessed incident.

Appropriate action includes:

- action to remove consumer/s from harm and to reduce or address the impact on any consumer/s
- contacting and meeting with consumers, their family and representatives to discuss the incident and explain the response to prevent recurrence
- identification and immediate internal reporting of the allegation, suspicion or witnessed incident, with appropriate escalation to senior staff of serious incidents
- documenting the incident
- further investigation by the provider if warranted
- reporting to external authorities within statutory timeframes, including the police and the Commission.

## What is the role of the Aged Care Quality and Safety Commission?

The Commission will be responsible for administering the SIRS and will receive serious incident reports from aged care providers. The Commission will have the power to take regulatory action where appropriate to address non-compliance with provider responsibilities, and will have new powers to issue compliance notices for suspected non-compliance with SIRS obligations.

For more information about SIRS, visit [agedcarequality.gov.au/consumers/serious-incident-response-scheme](https://agedcarequality.gov.au/consumers/serious-incident-response-scheme)

## How can I make a complaint about my aged care home?

If you feel comfortable, we encourage you to raise your concern with the staff or managers of the service first as this is often the best way to have your concern resolved. All aged care providers are required to have a complaints system in place.

Alternatively, the Commission provides a free service for anyone to raise a concern about the quality of care or services provided to people receiving Australian Government funded aged care.

Find out more at [agedcarequality.gov.au](http://agedcarequality.gov.au) or call 1800 951 822.

### Accessing the Older Persons Advocacy Network (OPAN)

Sometimes making a complaint on your own

can be difficult. There are several options for support to make a complaint.

OPAN supports older persons and their representatives to effectively access and interact with Australian Government funded aged care services and have their rights protected.

OPAN can be reached on 1800 700 600 or by visiting [opan.com.au](http://opan.com.au).

## What is a reportable incident under the scheme?

A reportable incident includes any of the following:

Serious incidents include those where consumers experience:	Examples
Unreasonable use of force	hitting, pushing, shoving or rough handling.
Unlawful sexual contact or inappropriate sexual conduct	sexual threats or stalking, or sexual activities without consent.
Neglect	withholding personal care, untreated wounds, or insufficient assistance during meals.
Psychological or emotional abuse	yelling, name calling, ignoring a consumer, threatening gestures or refusing a consumer access to care or services as a means of punishment.
Unexpected death	in the event of a fall, untreated pressure injury, or when the actions of a consumer result in the death of another consumer.
Stealing or financial coercion by a staff member	if a staff member coerces a consumer to change their will to their advantage, or steals valuables from the resident.
Inappropriate physical or chemical restraint	where physical or chemical restraint is used without prior consent or without notifying the consumer's representative as soon as practicable; where physical restraint is used in a non-emergency situation; or when a provider issues a drug to a consumer to influence their behaviour as a form of chemical restraint.
Unexplained absence from care	this occurs when the consumer is absent from the service, it is unexplained and has been reported to the police.

Under the SIRS, an allegation, suspicion or witness account of any of the above serious incidents must be reported to the Commission.



# Residential Aged Care Calculation of your cost of care (SA457)



## About this form

We understand that entering into aged care can be a sensitive time.

If you are entering an aged care home, the Australian Government may subsidise your aged care fees. **This form collects details of your income and assets so we can calculate the amount you will pay towards your residential aged care.**

A simpler digital version of this form is available by going to [servicesaustralia.gov.au/forms](https://servicesaustralia.gov.au/forms) and selecting 'Aged Care Calculation of your cost of care (SA486)'.



## Fee Estimator

You can get an estimate of the amount you may be asked to pay towards your residential aged care by going to [www.myagedcare.gov.au](https://www.myagedcare.gov.au) and searching for 'fee estimator'.

You can talk to a **Financial Information Service (FIS)** officer who will give you information about the financial aspects of aged care. Call us on **132 300** and say 'Financial Information Service' when we ask why you are calling.



## For more information

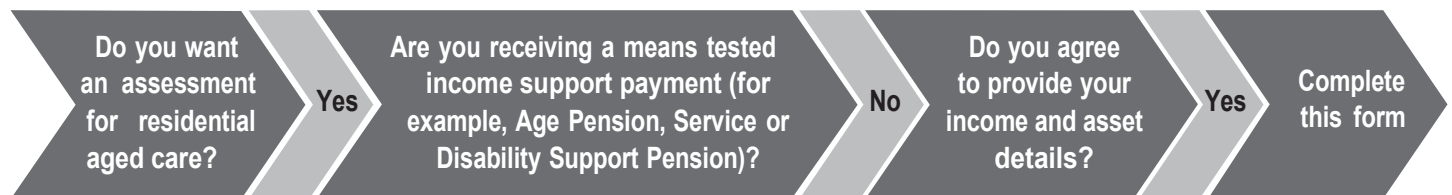
Go to [servicesaustralia.gov.au/agedcare](https://servicesaustralia.gov.au/agedcare) or call us on Freecall™ **1800 227 475**.

To speak to us in your language, call us on **131 202**. Call charges may apply.

If you have a hearing or speech impairment, you can contact the TTY service on Freecall™ **1800 555 677**.

If you receive a Department of Veterans' Affairs (DVA) payment, and would like to discuss your assessment you can call them on Freecall™ **1800 555 254**.

## When to use this form



No

Yes

No

Yes

If you want an assessment for a Home Care Package, complete the **Home Care Package Calculation of your cost of care (SA456)** form instead.

**If you receive a means tested payment from Centrelink or DVA, do not complete this form** (see the next page for a list of payments). Instead:

- If you **own or part own your home** including in a retirement village: Complete the shorter **Residential Aged Care Property details for Centrelink and DVA customers (SA485)** form.
- If you **do not own your home**: We can automatically complete an assessment for you when you enter residential aged care.

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

If you need a pre commencement fee letter call Centrelink on **1800 227 475** or DVA on **1800 555 254**.

If you do not wish to provide your income and asset details, complete this form and answer No at question 13. You will pay the maximum means-tested care fee until you reach the annual or lifetime cap.

This means that your provider can require you to pay the **basic daily fee, maximum means-tested care fee and accommodation cost**.

This assessment is valid for **120 days** from when we first notify you of the outcome.

**Keep these Notes (pages 1 to 4) for your information.**

## The following information is for your reference to help you fill in this form.

### Calculating your cost of care

All aged care residents may be asked to pay a basic daily fee. In addition, some residents may also be required to pay a means-tested care fee. This form is used to calculate the amount you will pay towards your cost of care.

There are annual and lifetime caps that apply to the means-tested care fee for residents who entered an aged care home after 1 July 2014. Services Australia will write to you and your service provider once you have reached the annual or lifetime cap.

Some residents will have their accommodation costs paid in full or in part by the Australian Government. Others will need to pay the accommodation cost they negotiate with their aged care home provider.

### Centrelink or Department of Veterans' Affairs payments

#### Non-means tested payments may include:

- Age Pension (Blind)
- Disability Support Pension (Blind)
- War Widow(er)s Pension
- Disability Compensation Payment paid by DVA (not including Income Support Supplement)
- Service Pension (Blind) paid by DVA

#### Means tested payments may include:

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

#### Who should complete this form?

If you are not receiving any Centrelink or DVA payments OR you are receiving a Centrelink or DVA **non-means** tested payment listed above, you will need to complete this form so we can calculate your cost of care. This is because we do not know enough about your income and assets to complete your assessment.

#### Who should not complete this form?

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

- you do not own your home, and
- you have updated your records within the last 2 years, or
- your assets and income have not changed since you last provided an update

**do not complete this form.** We have enough information about you to complete your assessment.

If you are receiving one of the Centrelink or DVA **means tested** payments listed above and you own or part own your home (including in a retirement village), **do not complete this form.** You will need to complete the shorter **Residential Aged Care Property details for Centrelink and DVA customers (SA485)** form, as we need to collect information about your home to complete your assessment.

**Remove this Notes booklet from the form if you have not already done so.**

## Protected person for aged care purposes

For aged care legislation purposes, a protected person is:

- your partner or dependent child
- your carer<sup>1</sup> who is eligible to receive an Australian Government income support payment and who has lived in your home with you for the past 2 years
- your close relative who is eligible to receive an Australian Government income support payment and who has lived in your home with you for the past 5 years.

If your home is occupied by a protected person, it may not be counted as an asset for aged care purposes.

Your carer or close relative will need to give their consent in this form to allow Services Australia or DVA to check their eligibility for an income support payment.

This exemption may be lost if the protected person who has been living in the home, moves out of the home or loses their eligibility for their income support payment.

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<sup>1</sup> It is not necessary for your carer to have received a Carer Payment or Carer Allowance in order to be considered a carer. However, at the date you enter care or complete this form your carer must meet the eligibility criteria for an Australian Government income support payment (notionally entitled person).

## Assets for the purposes of aged care

An asset is any property or item of value you (and/or your partner) own, or have an interest in, including those held outside Australia. Examples include real estate, shares, household contents and personal effects.

If you are a member of a couple, you are deemed to own half of the total combined assets, regardless of whose name these are held in.

If you enter residential aged care on or after 1 July 2014, and your home is not occupied by a protected person, it will be counted as an asset. However, the amount of the home included as an asset will be capped.

If your home is counted as an asset, you do not need to have it professionally valued. If required we will verify the estimated value of the property at no cost to you.

If you have made a gift, the limit you are able to give away is \$10,000 in the previous 12 months or \$30,000 in the previous 5 years – this cannot include more than \$10,000 in any year. Gifts over these amounts will be considered an asset in your assessment.

## Income for the purposes of aged care

Income, for the purposes of aged care, is not the same as taxable income. Your assessed income includes:

- income from work
- income support payments from the Australian Government, such as the Age Pension, a Service Pension or an Income Support Supplement
- income from financial investments
- net income from rental properties
- some payments paid by the Department of Veterans' Affairs
- net income from businesses, including farms
- superannuation and overseas pensions, income from income stream products such as annuities and allocated pensions
- family trust distributions or dividends from private company shares
- income from outside Australia.

If you have a partner, you will be asked to answer questions about your combined income. Your income will be assessed as half of the total combined income, regardless of whose name it is in.

Financial investments deemed to be earning income include bank accounts and other financial investments. It is important you tell us about all the bank accounts and financial investments you (and/or your partner) have no matter what income they are actually earning.

Money or assets that you (and/or your partner) have given away in the last 5 years, may be considered to earn income.



## Retirement villages or independent living units

Retirement villages or independent living units are not residential aged care homes and are not subsidised by the Australian Government. A retirement village provides accommodation for retirees (over the aged of 55). Independent living units are a housing option for older people who want to live independently.

Residents of retirement villages or those living in independent living units generally enter into an agreement that outlines how much they will pay to enter and the amount (if any) refundable after they leave. Following departure the amount refundable may be subject to this assessment.

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## 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 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.

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## Authorising a person or organisation to enquire or act on your behalf

You can authorise a person or organisation to enquire or act on your behalf for Centrelink payments and services including Aged Care. You will need to complete the **Authorising a person or organisation to enquire or act on your behalf (SS313)** form at the back of this form and return it separately. If you want more information about nominee arrangements, go to [servicesaustralia.gov.au/nominees](http://servicesaustralia.gov.au/nominees) or call us on Freecall™ **1800 227 475**.

If you are receiving a DVA means tested payment (see notes page 2 of 4) complete the **Aged Care Request for a nominee for Department of Veterans' Affairs customers (AC019)** form by going to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms).

For information about the DVA authorised person arrangements, call DVA on Freecall™ **1800 555 254**.

**Keep these Notes (pages 1 to 4) for your information.**

## 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 will see **entry/application date** in many of the questions located in this form. Below is a brief explanation of what the term means and what we need from you.

**Entry date** – If you are permanently living in an aged care home you need to answer the questions and provide the documentation based on your date of entry into the home. For example, if you permanently moved into an aged care home on 1 January 2019 you need to provide supporting documents that show your income and assets on the date you entered care.

**Application date** – If you have not moved into an aged care home you need to answer the questions and provide supporting documentation based on your current situation. For example, if you lodged the form on 1 January 2019 you need to provide supporting documents that show your income and assets on the date you lodged this form.

**1** What type of care do you (the person who the assessment is for) want an assessment for?


residential  ► *Go to next question*  
aged care

Home Care   Do not complete this form.  
Package See 'When to use this form' on the front page.

**2** Do you receive a means tested income support payment from Centrelink or DVA?

For a list of means tested payments, refer to 'Centrelink or Department of Veterans' Affairs payments' in the **Notes Section**, on page 2 of the notes.

No  ► *Go to next question*

Yes   Do not complete this form. See 'When to use this form' on the front page.

**3** Are you completing this form on behalf of someone else?

For example, partner, parent or relative.

No  ► *Go to next question*

Yes  ► Give details below

Your full name


Your relationship to the person the assessment is for

If you wish to be listed as a nominee for aged care purposes, you and/or the person this assessment is for will need to complete the nominee section at the back of this form. Nominees may be contacted by us regarding this assessment.

**4** Do you (the person who the assessment is for) have a partner?

In this form we will collect information about your partner. If your partner would like an assessment, they need to complete a separate assessment form.

For this assessment, a partner can be either:

- a person you are legally married to, or who you were living with in a de facto relationship, but are now living apart on a permanent basis due to a **health related reason**, for example, if the person entered residential aged care
- a person you are legally married to, and normally live with on a permanent basis
- a person who lives with you in a de facto relationship, although you are not legally married to that person
- a person in a registered relationship.

No  ► *Go to next question*

Yes  ► We will be asking basic information about your partner.

If your partner would like an assessment, they need to complete a separate assessment form (SA457).

► *Go to next question*



CLK0SA457 2201



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

**You (the person the assessment is for)**

5 Your name

Mr  Mrs  Miss  Ms  Other

Family name

First given name

Second given name

6 Your gender

Male

Female

7 Your date of birth

8 Do you have a Centrelink or DVA reference number?

No  Go to next question

Yes  Give details below

Centrelink Customer 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)**

5 Your partner's name

Mr  Mrs  Miss  Ms  Other

Family name

First given name

Second given name

6 Your partner's gender

Male

Female

7 Your partner's date of birth

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

No  Go to next question

Yes  Give details below

Centrelink Customer Reference Number (if known)

Department of Veterans' Affairs reference number

Name of Department of Veterans' Affairs payment

**You (the person the assessment is for)**

9 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 (for example, name at birth)

2 Other name

Type of name (for example, name before marriage)

If you need more space, provide a separate sheet with details.

10 Read this before answering the following question.

If you provide an email address or mobile phone number, you may receive electronic messages (SMS or email) from us. To read the Terms and Conditions, go to **servicesaustralia.gov.au/em** or visit one of our Centrelink service centres.

Your contact details

Phone number

Email

11 What is your current address including if you live in residential aged care?

  
  
 Postcode

12 Postal address if different to home address

  
  
 Postcode

**Your partner (of the person the assessment is for)**

9 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 (for example, name at birth)

2 Other name

Type of name (for example, name before marriage)

If you need more space, provide a separate sheet with details.

10 Read this before answering the following question.

If your partner provides an email address or mobile phone number, they may receive electronic messages (SMS or email) from us. To read the Terms and Conditions, go to **servicesaustralia.gov.au/em** or visit one of our Centrelink service centres.

Your partner's contact details

Phone number

Email

11 Your partner's home address

  
  
 Postcode

12 Your partner's postal address if different to home address

  
  
 Postcode

## Your assessment

13 Do you want to provide your income and asset details so we can calculate your cost of care?

No  You will pay the maximum means-tested care fee until you reach the annual or lifetime cap. This means that your provider can require you to pay the **basic daily fee, maximum means-tested care fee and accommodation cost.**

▶ **Go to 64**

Yes  You are giving us permission to disclose your information to the Department of Social Services, the Department of Health, and/or the Department of Veterans' Affairs.

▶ **Go to next question**

14 What do you want this assessment for?

The entry/application date is the date you have entered care or the date you have lodged this form.

**Tick one only**

### Option 1: You are planning on going into a residential aged care home

You will need to answer the questions in the form and provide supporting documentation based on your current situation.

We will use the date you lodge the form as the **application date.**

**Go to 15**

### Option 2: You are now or were in a residential aged care home

You will need to answer the following questions and provide supporting documentation based on your situation at the date of **entering the residential aged care home.**

What was that entry date?

/ /

**Go to 15**

### Option 3: You have entered a residential aged care home before 1 July 2014

You are a residential aged care home resident who was already in permanent residential care **before 1 July 2014** and are thinking of having an assessment done under the current means testing rules as you are considering changing aged care provider.

**You will need to call us on Freecall™ 1800 227 475.**

## Dependent children

15 **Read** this before answering the following question.

For aged care purposes, to be a dependent child the young person must be:

- under 16 years of age, or
- 16–24 years of age and receiving full-time education at a school, college or university, **and not** in full-time employment or receiving a Centrelink income support payment.

You must be legally responsible (whether alone or jointly with another person) for their day-to-day care, welfare and development, or under a legal obligation to provide financial support to them.

Do you (and/or your partner) have any dependent children/students in your care?

No  **Go to 17**

Yes  Give details below

Details of the **youngest** dependent child/student in your care.

Dependent family name

Dependent first given name

Dependent second given name

Dependent gender

Male

Female

Dependent date of birth

/ /

16 At the entry/application date did this dependent child/student live in the family home?

No

Yes

## Your home details

**17** Did you (and/or your partner) own or part-own your home at the entry/application date?

Answer 'Yes' to this question for situations including, but not limited to:

- you were paying off a mortgage on your home
- your home was in a retirement village and you had paid an entry contribution
- your home was owned by a private/family trust or a private company that was controlled by you (and/or your partner), or
- you have an agreement with somebody else who owns part of the home (business/family partnership).

No  ► **Go to 34**

Yes  ► What is your home address or previous address if you are now living in residential aged care?

Postcode

**18** Do you (and/or your partner) still own or part-own this home?

No  ► *Go to next question*

Yes  ► **Go to 20**

**19** Select the option that applies to you:

**Option 1: You sold your home**

How much was your home sold for?	\$
On what date was your home sold?	/ /

**Option 2: You transferred the title of your home to someone else**

How much was your home worth at the time the title was transferred?	\$
On what date was the title transferred?	/ /
Did you receive anything in return for the title transfer?	
No <input type="checkbox"/>	
Yes <input type="checkbox"/> ► How much did you receive?	
	\$

**Option 3: You vacated your home in a retirement village**

What amount was (or will be) paid to you (and/or your partner) when the retirement village unit was (is) vacated?	\$
When was (or will) this amount be paid to you (and/or your partner)?	/ /



Provide documentation which gives details of the sale of your home, the details of the transfer or details of the retirement village agreement.

For example:

- a solicitor's letter
- documentation which gives details of the sale/transfer of your home
- what has been done with the proceeds
- bank statements and agreements.

► **Go to 31**

20 At the entry/application date, was your home a:

- retirement village unit
- mobile home or motor home
- caravan
- boat?

No  Go to next question

Yes  Give details below

Type of asset <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	
Estimated market value \$ <input style="width: 150px;" type="text"/>	Balance of loan(s) \$ <input style="width: 150px;" type="text"/>
Who owns your home?	
Your share <input style="width: 50px;" type="text"/> %	Your partner's share <input style="width: 50px;" type="text"/> %
Other's share <input style="width: 50px;" type="text"/> %	
Do you have a partner who is/was living in your home at the entry/application date?	
No <input type="checkbox"/> Go to 26	
Yes <input type="checkbox"/> Go to 26	

Provide documentation on the value of the mobile home/caravan/boat, refundable entry contributions or property.  
Provide a copy of a statement showing the amount owing for any loans.

21 What type of property is your home:

House

Townhouse (including duplex/triplex)

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

Unit/flat

How many units/flats are in the block?

Part of a farming property

Other  Give details below


22 Select the **option** that applies to you and answer the questions based on the entry/application date:

**Option 1: Small property, suburban block or apartment/unit**

My home is on land up to and including 5 acres (2 hectares)  Give details below

Estimate the market value of your property including the buildings \$ <input style="width: 150px;" type="text"/>	Balance of loan(s) for your property \$ <input style="width: 150px;" type="text"/>
Who owns your home as shown on the property title?	
Your share <input style="width: 50px;" type="text"/> %	Your partner's share <input style="width: 50px;" type="text"/> %
Other's share <input style="width: 50px;" type="text"/> %	
Do you have a partner who is living in your home at the entry/application date?	
No <input type="checkbox"/> Go to 23	
Yes <input type="checkbox"/> Go to 26	

If you have a mortgage provide a copy of a statement showing the amount owing for each mortgage.

**Option 2: Large property or large suburban block**

My home is on land over 5 acres (2 hectares)  Give details below


For example, if your home is on a 20 acre property provide separate estimated values for the home and the first 5 acres of land in the first box and the remaining 15 acres in the second box.

Estimate the market value of the first 5 acres of your property including the buildings \$ <input style="width: 150px;" type="text"/>	Estimate the market value of the remaining acreage \$ <input style="width: 150px;" type="text"/>
Balance of loan(s) for your property \$ <input style="width: 150px;" type="text"/>	
Who owns your home as shown on the property title?	
Your share <input style="width: 50px;" type="text"/> %	Your partner's share <input style="width: 50px;" type="text"/> %
Other's share <input style="width: 50px;" type="text"/> %	
Do you have a partner who is living in your home at the entry/application date?	
No <input type="checkbox"/> Go to 23	
Yes <input type="checkbox"/> Go to 23	

If you have a mortgage provide a copy of a statement showing the amount owing for each mortgage.

**23** What is the legal description of the property (for example, lot, section, parish, etc.)?

This information can be found on a rates notice. If the property is made up of more than one title, provide details for each separate title.


 Provide a copy of the council rates notice.

**24** What is the area or dimension of the property?

You do not need to answer this question if your home is a unit or flat.

Complete **one** of these measurements only.

Area in hectares

or Area in acres

or Area in square metres

or Dimensions  X

**25** Describe all buildings on the property

This will help us to value the property.

<b>1</b> What is the approximate floor area in square metres?	How old is the building?
---	--------------------------

<input type="text"/>	<input type="text"/>
----------------------	----------------------

Type of construction

Exterior (for example, brick, timber)

Interior (for example, plaster, not lined)

Roof (for example, iron, tiled)

General condition (for example, fair, good, poor)

Total number of flats/units in complex (if applicable)

For residential building, number of bedrooms

Number of other rooms (excluding laundry, bathroom, toilet)

If you need more space, provide a separate sheet with details.

**26** Are you (and/or your partner) using any rooms or buildings in your home property solely for business purposes?

This includes rooms used for a bed and breakfast or a room/office used solely for running a business.

No  Go to next question

Yes  Value of the rooms or buildings of your home property used only for business

\$

**27** Is any portion of the land surrounding your home property used primarily for business purposes?

This includes using the land for cultivation, orchards, grazing animals or accessed for other reasons such as camping sites.

No  Go to next question

Yes  Estimated value of the portion of the land (up to 2 hectares or 5 acres) surrounding your home property that you own and that is used primarily for business purposes

\$

**28** Is your home part of a farm property?

No  Go to 30

Yes  Farm property primarily used for (for example, grazing, wheat, hobby)

**29** Is the farm property currently operational/viable?

No

Yes

Is it possible to subdivide the farm property or farm home?

No


Yes

List any other constructions located on the property (for example, workers' quarters, manager's house)


If you need more space, provide a separate sheet with details.

30 Did you (and/or your partner) receive rental income from your home property at the entry/application date?

No  Go to next question

Yes   Provide documents showing details of the rental income and the outgoings (costs) for each property.

31 At the entry/application date, did any of the following people live in your home?

**Tick all that apply.** If there is more than 1 person provide a separate sheet for question 31 to question 33.

Carer: Any person providing daily care to you, who has occupied the home for at least 2 years  Go to 32

Close relative: your sister, brother, child, grandchild, or parent who has occupied the home for at least 5 years  Go to 32

None of the above  Go to 34

32 Does this person still live in the home?

No  Date vacated

/  /

Go to next question

Yes  Go to next question

## Consent by carer or close relative

33 Read this before answering the following question.

Services Australia or the Department of Veterans' Affairs needs to verify the period that your carer or close relative occupied your home and that they were eligible to receive an income support payment at the entry/application date.

### Carer or close relative (protected person)

Make sure you have read the **Privacy and your personal information** on page 20 of this assessment and you have read the 'Protected Person' section on page 3 of the **Notes**.

### Consent by carer or close relative

Details of carer or close relative

Family name

First given name

Second given name

Date of birth

/  /

Centrelink Customer Reference Number (if known)

-  -  -

OR


Department of Veterans' Affairs reference number

Relationship to the applicant

Phone number

**I consent to** Services Australia or the Department of Veterans' Affairs using information collected from me for income support payment purposes and for the additional purpose of determining the value of the applicant's assets under the *Aged Care Act 1997*.

Signature of carer or close relative



Date

/  /

## Your other property details

**34** Other than your family home, did you (and/or your partner) have other properties in and/or outside of Australia at the entry/application date?

No  **Go to 44**

Yes  Give details below

Address of the property

Postcode

Country (if not in Australia)

--

If you have/had more than one other property, at the entry/application date, you will need to copy and attach pages 9 to 10 answering questions **34** to **43** for each property.

**35** What is the legal description of the other property (for example, lot, section, parish, etc.)?

This information can be found on a rates notice. If the property is made up of more than one title, provide details for each separate title.


Provide a copy of the council rates notice.

**36** Who owned/owns your other property as shown on the property title at the entry/application date?

You  Percentage owned  %

Your partner  Percentage owned  %

Other  Give details below

Name of person/entity

--

Percentage owned

<input style="width: 95%;" type="text"/> %
--

Provide a copy of each title deed if you answered 'Other'.

**37** What type of property is this?

- Vacant land
- House on land larger than 2 hectares (5 acres)
- Townhouse
- Self contained flat (part of or attached to a house)
- Units/flats
- Retail premises
- Commercial premises
- Industrial premises
- Farm/primary producer property
- Market garden
- Hobby farm
- Bush block
- House
- Other  **Give details below**


**38** What is your estimate of the current market value of the property, including land, buildings and water assets (for example, water rights, allocations or licences)?

If your other property is counted as an asset, you do not need to have it professionally valued. If required, we will verify the estimated value of the property at no cost to you.

\$

Provide a copy of the water rights, allocation or licence documents, if applicable.

Are there any circumstances affecting the value of the property?

This may include details such as:

- no water on property for grazing livestock
- lack of adequate fencing
- hills
- rocky ground
- natural bushland
- unusual title.

No  **Go to next question**

Yes  Give details below


If you need more space, provide a separate sheet with details.



39 Describe all buildings on the other property

This will assist us to value the property.

1 What is the approximate floor area in square metres? How old is the building?

Input boxes for floor area and building age.

Type of construction

Exterior (for example, brick, timber)

Input box for exterior construction type.

Interior (for example, plaster, not lined)

Input box for interior construction type.

Roof (for example, iron, tiled)

Input box for roof type.

General condition (for example, fair, good, poor)

Input box for general condition.

Total number of flats/units in complex (if applicable)

For residential building, number of bedrooms

Number of other rooms (excluding laundry, bathroom, toilet)

If you (and/or your partner) have more than 1 building on this property, provide a separate sheet with details.

40 What is the area or dimension of the other property?

Complete one of these measurements only.

Area in hectares

or Area in acres

or Area in square metres

or Dimensions X

If your property is made up of more than one title, provide a separate sheet with details of the area or dimensions for each title.

41 Was the property mortgaged or encumbered at the entry/application date?

No Go to next question

Yes Provide the: mortgage or loan agreement(s) showing which assets or properties are held as security against the loan (if applicable) statement of each loan account.

42 Did you (and/or your partner) receive rental income from your other property, at the entry/application date?

Include rental income from properties both in and/or outside Australia.

No Go to next question

Yes Provide documents showing details of the rental income and the outgoings (costs) for each property.

43 What is your estimate of the current market value of the household contents you (and/or your partner) own in the other property, at the entry/application date?

Only answer this question if this property is not your home property.

The current market value of the household contents is what you would get if you sold it. It is not the replacement or insured value.

If you do not provide an estimate, we will use a default amount of \$10,000.

Include:

- all furniture (including soft furnishings such as curtains), antiques and works of art
electrical appliances such as televisions and fridges.

Do not include:

- fixtures such as stoves and built-in items.

Current market value

Input box for current market value with a dollar sign.

## Assets and income

- 44 What is your estimate of the **current market value** of your (and/or your partner's) **household contents** and **personal effects** at the entry/application date?

The **current market value** is the price that you would expect to get **if you sold the item**. It is not the replacement or insured value.

If you do not provide an estimate we will use a default amount of \$10,000.

**Include:**

- all furniture (including soft furnishings such as curtains), antiques and works of art
- electrical appliances such as televisions and fridges
- jewellery for personal use.

**Do not include:**

- fixtures such as stoves and built-in items.


An estimate of the current market value

\$

- 45 Did you (and/or your partner) own, partly own or have a financial interest in any **motor vehicles, boats, caravans or trailers** at the entry/application date?

No  Go to next question

Yes  Give details below

 Provide a copy of a statement showing the amount owing for each loan, if applicable.

<b>1</b> Type of asset (for example, car)	Make (for example, Ford)
<input type="text"/>	<input type="text"/>
Model (for example, Focus)	Year
<input type="text"/>	<input type="text"/>
Current market value	Balance of loan(s)
\$ <input type="text"/>	\$ <input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

<b>2</b> Type of asset (for example, car)	Make (for example, Holden)
<input type="text"/>	<input type="text"/>
Model (for example, Astra)	Year
<input type="text"/>	<input type="text"/>
Current market value	Balance of loan(s)
\$ <input type="text"/>	\$ <input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

If you need more space, provide a separate sheet with details.


- 46 Give details below of all **accounts** held by you (and/or your partner) in banks, building societies or credit unions at the entry/application date.

**Include:**

- savings accounts
- cheque accounts
- term deposits
- accounts you hold in trust or under any other name
- joint accounts
- money held in church or charitable development funds
- money located in travel money cards or travellers cheques.

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 (AUD).

**Do not include** superannuation, shares, managed investments or an account used exclusively for funding from the National Disability Insurance Scheme (NDIS).

 Provide evidence from your financial institution that shows your current account balance, BSB code, account number and account holder name(s). Copies can be provided. ATM slips are not acceptable.

<b>1</b> Name of bank, building society or credit union	<input type="text"/>
Account number (this may not be your card number)	<input type="text"/>
Type of account	<input type="text"/>
Balance of account	<input type="text"/>
Currency if not AUD	<input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

<b>2</b> Name of bank, building society or credit union	<input type="text"/>
Account number (this may not be your card number)	<input type="text"/>
Type of account	<input type="text"/>
Balance of account	<input type="text"/>
Currency if not AUD	<input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

If you need more space, provide a separate sheet with details.

47 Did you (and/or your partner) have any **money invested in superannuation or income stream products** at the entry/application date?

**Superannuation includes:**

- approved deposit funds
- deferred annuities
- retirement savings accounts
- Self Managed Superannuation Funds (SMSF) and Small APRA Funds (SAF) if the funds are complying.

An **income stream product** is a regular series of payments which may be made for a lifetime or a fixed period by:

- a financial institution
- a superannuation fund
- a Self Managed Superannuation Fund (SMSF)
- a Small APRA Fund (SAF)
- an employer subject to Australian prudential regulations.

**Types of income streams include:**

- Allocated Pension (also known as Account Based Pension)
- Market-Linked Pension (also known as Term Allocated Pension)
- Annuities
- Defined Benefit Pension (for example, ComSuper pension, State Super pension and Australian Defence Force superannuation payments)
- Superannuation Pension (non-defined benefit).

No  Go to next question

Yes  Give details below



If you have money invested in an income stream product provide a schedule for each fund.

Provide the statements for each fund, including council rates notices for any real estate held by SMSF and SAF.

Continued

<b>2</b> Name of institution/fund manager		
Name of fund		
Account balance (if applicable)	Amount that can be withdrawn as a lump sum (if applicable)	
\$	\$	
Amount of income received (if any)	How often (for example, monthly)	
\$	per	
Date of purchase	Your share	Partner's share
/ /	%	%
If you need more space, provide a separate sheet with details.		

<b>1</b> Name of institution/fund manager		
Name of fund		
Account balance (if applicable)	Amount that can be withdrawn as a lump sum (if applicable)	
\$	\$	
Amount of income received (if any)	How often (for example, monthly)	
\$	per	
Date of purchase	Your share	Partner's share
/ /	%	%

**48** Did you (and/or your partner) have any **managed investments** in and/or outside Australia at the entry/application date?

**Include:**

- investment trusts
- personal investment plans
- life insurance bonds
- managed fund
- friendly society bonds.


**Do not include:**

- conventional life insurance policies (policies that can be cashed in)
- funeral bonds
- superannuation or rollover investments
- investments purchased with a margin loan.

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

No  Go to next question

Yes  Give details below

 Provide a copy of the document which gives details (for example, certificate with number of units or account balance) for each investment.

**1** Name of company

Name of product (for example, investment trust)		Type of product/option (for example, balanced, growth)	
<input type="text"/>		<input type="text"/>	
Number of units	APIR code (if known)		
<input type="text"/>	<input type="text"/>		
Current market value	Currency if not AUD		
\$ <input type="text"/>	<input type="text"/>		
Your share <input type="text"/>	%	Partner's share <input type="text"/>	%

**2** Name of company

Name of product (for example, investment trust)		Type of product/option (for example, balanced, growth)	
<input type="text"/>		<input type="text"/>	
Number of units	APIR code (if known)		
<input type="text"/>	<input type="text"/>		
Current market value	Currency if not AUD		
\$ <input type="text"/>	<input type="text"/>		
Your share <input type="text"/>	%	Partner's share <input type="text"/>	%

If you need more space, provide a separate sheet with details.

**49** At the entry/application date did you (and/or your partner) own any **shares**, or other **securities listed** on a stock/securities exchange in and/or outside Australia, or in public companies **not listed** on a stock exchange?

**Include:**


- futures
- options
- derivatives
- rights
- shares
- preference shares
- convertible notes.

**Do not include:**

- managed investments
- self managed superannuation funds.

No  Go to next question

Yes  Give details below

 Provide the statement for each share holding.

**1** Name of the public company

<input type="text"/>		
ASX code (if you have one)	Number of shares held	
<input type="text"/>	<input type="text"/>	
Country if not Australia	Your share	Partner's share
<input type="text"/>	<input type="text"/>	<input type="text"/>
	%	%

**2** Name of the public company

<input type="text"/>		
ASX code (if you have one)	Number of shares held	
<input type="text"/>	<input type="text"/>	
Country if not Australia	Your share	Partner's share
<input type="text"/>	<input type="text"/>	<input type="text"/>
	%	%

**3** Name of the public company

<input type="text"/>		
ASX code (if you have one)	Number of shares held	
<input type="text"/>	<input type="text"/>	
Country if not Australia	Your share	Partner's share
<input type="text"/>	<input type="text"/>	<input type="text"/>
	%	%

If you need more space, provide a separate sheet with details.

**50** Did you (and/or your partner) have any **bonds or debentures** at the entry/application date?

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/investments
- aged care accommodation bonds, aged care refundable accommodation deposits, or aged care refundable accommodation contributions.

No  Go to next question

Yes  Give details below

 Provide a document which gives details for each bond or debenture.

**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 need more space, provide a separate sheet with details.

**51** Did you (and/or your partner) have any **funeral bonds, funeral investments** or have a contract to have funeral services provided for which an agreed sum has already been paid to the provider at the entry/application date?

No  Go to next question

Yes  Give details below

 Provide documentation showing details of the funeral bonds, funeral investments or a copy of each contract.

**1** Name of company

--

Name of product

--

APIR code (if known)      Purchase price including instalments but not interest

	\$
--	----

Current value as per latest statement      Your share      Partner's share

\$	<input type="text"/> %	<input type="text"/> %
----	------------------------	------------------------

**2** Name of company

--

Name of product

--

APIR code (if known)      Purchase price including instalments but not interest

	\$
--	----

Current value as per latest statement      Your share      Partner's share


\$	<input type="text"/> %	<input type="text"/> %
----	------------------------	------------------------

If you need more space, provide a separate sheet with details.

**52** Did you (and/or your partner) have any **life insurance** policies that could be cashed in at the entry/application date?

No  Go to next question

Yes  Give details below

 Provide a copy of the statement for each policy.

<b>1</b> Name of product		
<input type="text"/>		
Policy number		
<input type="text"/>		
Number of units	Your share	Partner's share
<input type="text"/>	<input type="text"/> %	<input type="text"/> %

<b>2</b> Name of product		
<input type="text"/>		
Policy number		
<input type="text"/>		
Number of units	Your share	Partner's share
<input type="text"/>	<input type="text"/> %	<input type="text"/> %


If you need more space, provide a separate sheet with details.

**53** Have you (and/or your partner) paid a **lump sum accommodation payment to a residential aged care home** at the entry/application date?

No  Go to next question

Yes  Give details below

How much was paid	When was the last payment made
\$ <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>

 Provide a copy of a receipt for all lump sum accommodation payments and documents detailing the source of the funds. If the lump sum accommodation payment was paid in instalments, provide a receipt for each payment made.


**54** Did you (and/or your partner) have **money on loan** to another person or organisation at the entry/application date?

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

**Do not include** loans to secure accommodation in retirement villages or aged care.

No  Go to next question

Yes  Give details below

 Provide a document which gives details for each loan (if available).

If the money was loaned to a private trust you will need to complete and return the **Private Trust (Mod PT)** form. If you do not have this form, go to [servicessaustralia.gov.au/forms](http://servicessaustralia.gov.au/forms)

<b>1</b> Who did you lend the money to?		
<input type="text"/>		
Date lent	Amount lent	
<input type="text"/> / <input type="text"/> / <input type="text"/>	\$ <input type="text"/>	
Current balance of loan	Lent by you	Lent by your partner
\$ <input type="text"/>	<input type="text"/> %	<input type="text"/> %

<b>2</b> Who did you lend the money to?		
<input type="text"/>		
Date lent	Amount lent	
<input type="text"/> / <input type="text"/> / <input type="text"/>	\$ <input type="text"/>	
Current balance of loan	Lent by you	Lent by your partner
\$ <input type="text"/>	<input type="text"/> %	<input type="text"/> %

If you need more space, provide a separate sheet with details.

**55** In the 5 years **before** your application/entry date, have you (and/or your partner) **given away**, or sold for less than their market value, or surrendered a right to any cash, assets, property or income?

**Gifting is where you:**

- give away assets, or
- transfer them for less than their market value.

**For example, if you or your partner:**

- give away/transfer shares in a private company
- transfer your shares or units in a trust or company and do not get full market value for them
- give up control of a trust or company – this is a gift of all the assets the trust or company holds
- own a property and sell it for less than it is worth
- buy a car as a present
- have 10% of your wages donated to your church
- forgive a loan
- have to repay a business loan because you guaranteed it
- put money into a family trust and neither you nor your partner control the trust.

**It is not gifting if you:**

- own a house valued at an amount, but sold it on the open market with the best offer to date, as you could not wait for a higher offer
- have a debt that you cannot repay, so you transfer a car worth about the same to wipe out the debt
- put money into a family trust that you or your partner control.

For more information, refer to page 3 of the notes.

No  Go to next question

Yes  Give details below

**1** What you gave away or sold for less than its market value (for example, 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

*Continued*

**2** What you gave away or sold for less than its market value (for example, 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 need more space, provide a separate sheet with details.

**56** Did you (and/or your partner) **receive payments from outside Australia** at the entry/application date?

**Include** pensions from other countries, benefits, allowances, superannuation, compensation and war related payments in the type of currency in which it is paid. We will convert this into Australian dollars. You must include details of pensions, allowances and other payments even if they are not taxable in the country of payment.

No  Go to next question

Yes  Give details below

Provide a document from the issuing authority or agency which gives details including the amount in the foreign currency (for example, latest pension certificate) for each payment.

**1** Type of payment

Country which pays it?

Amount paid (before tax or deductions)	Currency if not AUD

Paid to: You  Your partner



Continued

<b>2</b> Type of payment
<input type="text"/>
Country which pays it?
<input type="text"/>
Amount paid (before tax or deductions)
<input type="text"/>
Currency if not AUD
<input type="text"/>
Paid to: You <input type="checkbox"/> Your partner <input type="checkbox"/>
If you need more space, provide a separate sheet with details.

**57** Did you (and/or your partner) have an interest in a **business** at the entry/application date?

**Include:**

- self-employed
- sole trader
- partnership
- sub-contractor.

No  Go to next question

Yes



You will need to provide:

- your (and/or your partner's) personal income tax return(s)
- business income tax return for the last financial year
- a profit and loss statement, depreciation schedule and any other explanatory notes which form part of the accounts of the business or company.

**58** Have you (and/or your partner) **had an interest** in a **private trust** in any of the ways detailed below, in the 5 years up to the entry/application date?

You are considered to have an interest in a private trust if **any** of the following apply.

You (and/or your partner) are:

- the appointor
- guardian or principal of the trust
- a trustee

or

- are a shareholder or director of the trustee company
- are a beneficiary or included amongst the categories of beneficiaries of the trust
- are a unit holder
- are owed money by the trust
- are able to benefit from the trust
- can expect the trustee or appointor of a trust to act in accordance with your wishes.

No  Go to 60

Yes



If you (and/or your partner) have not previously advised us of this trust, complete and return a **Private Trust (Mod PT)** form.

If you do not have this form, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)

**59** Is the private trust a **Special Disability Trust** (SDT)?

No

Yes

**60** Have you (and/or your partner) **had an interest** in a **private company** in any of the ways detailed below, in the 5 years up to the entry/application date?

You are considered to have an interest in a private company if **any** of the following apply.

You (and/or your partner):

- are a shareholder of the private company
- are a director or other office holder of the company
- are owed money by the company
- are able to benefit from the company
- can expect the director of a company to act in accordance with your wishes
- can expect the governing director or majority shareholder to act in accordance with your wishes.

No  Go to next question

Yes  Was your involvement only as a director and you (and/or your partner) have no shares in or loans to the company?

No



You will need to complete and return the **Private Company (Mod PC)** form.

If you do not have this form, go to [servicesaustralia.gov.au/forms](http://servicesaustralia.gov.au/forms)  
Go to next question

Yes  Go to next question



**61** Did you (and/or your partner) have any **other assets** (in or outside Australia) that you have not already advised us about on this form at the entry/application date?

**Include:**

- taxi plates
- time share
- racehorses
- gold bullion
- travel cash passports
- cyber currency (for example, bitcoin)
- collectables (for example, stamps, coins, wine, art, antiques)
- commercial licences (for example, fishing, hunting).

**Do not include** an account used for funding from the National Disability Insurance Scheme (NDIS).

No  Go to next question

Yes  Give details below

 Provide supporting documentation.

<b>1</b> Description of asset		
<input type="text"/>		
Current market value	Amount owed	
<input type="text"/>	<input type="text"/>	
Currency if not AUD	Your share	Partner's share
<input type="text"/>	<input type="text"/> %	<input type="text"/> %

<b>2</b> Description of asset		
<input type="text"/>		
Current market value	Amount owed	
<input type="text"/>	<input type="text"/>	
Currency if not AUD	Your share	Partner's share
<input type="text"/>	<input type="text"/> %	<input type="text"/> %

If you need more space, provide a separate sheet with details.

**62** Did you (and/or your partner) receive any **other income** that you have not already listed on this form at the entry/application date?


**Include** income or money from:

- income from boarders and lodgers
- income protection insurance
- life interests
- other Australian government departments
- other income (for example, royalties)
- other payments from outside Australia
- regular compensation payments or damages
- work (including holiday pay, long service leave, sick pay)
- gratuities (tips).

**Do not include** for you (and/or your partner and/or your child(ren)) funding from the National Disability Insurance Scheme (NDIS).

No  Go to next question

Yes  Give details below

 Provide a copy of documentation giving details of the type and the amount of the payment.

<b>1</b> Type of income		
<input type="text"/>		
Gross amount received		
\$	per	
<input type="text"/>	<input type="text"/>	
Currency if not AUD	Your share	Partner's share
<input type="text"/>	<input type="text"/> %	<input type="text"/> %

<b>2</b> Type of income		
<input type="text"/>		
Gross amount received		
\$	per	
<input type="text"/>	<input type="text"/>	
Currency if not AUD	Your share	Partner's share
<input type="text"/>	<input type="text"/> %	<input type="text"/> %

If you need more space, provide a separate sheet with details.

**Questions continue next page** ►

## Department of Veterans' Affairs customers

**63** Are you (and/or your partner) a veteran or a dependant of a deceased veteran?

No  Do not continue with these questions as you (and/or your partner) are not a veteran or a dependant of a veteran. ► **Go to 64**

Yes  *Go to next question*

Did you (and/or your partner) receive a payment of \$25,000 from the Australian Government as compensation for internment by:

- North Korean forces during the Korean war, or
- Japanese or Axis forces during World War II?

No  *Go to next question*

Yes  The amount of these payments is deducted from the value of your assets if you have received them. ► *Go to next question*

**Read** this before answering the following question.

Qualifying service is service in a war or war like operations where you incurred danger from hostile forces of the enemy.

Do you and/or your partner have **qualifying service**?

No

Yes  Any Department of Veterans' Affairs Adjusted Disability Pension you receive will be exempt from the aged care income assessment.



## Person authorised to act on behalf of a Department of Veterans' Affairs client

The Department of Veterans' Affairs clients can nominate a representative for income support payment purposes.

Persons authorised to act on behalf of a client, such as those holding a power of attorney, are able to assist you to meet your obligations under the *Veterans' Entitlement Act 1986* by notifying the Department of Veterans' Affairs of changes on their behalf. However, the obligation to inform the Department of Veterans' Affairs of changes in circumstances that may affect your pension or allowance(s) remains with you.

For income support purposes, the Department of Veterans' Affairs authorised persons have the authority to:

- enquire about your pension
- assist you to meet your obligations to the Department of Veterans' Affairs.

Persons holding a valid financial power of attorney can also be accepted as having the authority to:

- act as a signatory for you
- receive income support related mail on your behalf.

If you wish to be registered as a power of attorney for future contacts with the Department of Veterans' Affairs, provide a certified copy of your power of attorney documentation.

For information about the Department of Veterans' Affairs authorised person arrangements, call the Department of Veterans' Affairs on Freecall™ **1800 555 254**.

**Go to next page ►**

## Privacy notice

### 64 You need to read this

#### Privacy and your personal information

The privacy and security of your personal information is important to us, and is protected by law. We need to collect this information so we can process and manage your applications and payments, and provide services to you. We only share your information with other parties where you have agreed, or where the law allows or requires it. For more information, go to [servicessaustralia.gov.au/privacy](http://servicessaustralia.gov.au/privacy)

## Declaration for the person the assessment is for

### 65 Read this before continuing.

If you (the person who the assessment is for) are not able to sign this declaration, it should be signed by someone who is authorised to sign on your behalf. The authorised person must also sign question 66. See 'Person signing on your behalf' section on page 4 of the **Notes**.

#### I consent to:

- the Department of Health providing Services Australia 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 the person the assessment is for (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.

## 66 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 nominee



Date

/ /

When 2 or more people have joint power of attorney, all people with joint power of attorney need to sign. If more than 2 signatures are required, provide a separate sheet with details.

Signature of second legal guardian, power of attorney or existing 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 nominee arrangement

Questions continue 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**

Details of the sale of your home or details of the transfer or retirement village agreement (If you answered Yes at <b>question 19</b> )	<input type="checkbox"/>
Details on value of mobile home/caravan/boat, refundable entry contributions or property (If you answered Yes at <b>question 20</b> or <b>22</b> )	<input type="checkbox"/>
Statement showing the amount owing for each mortgage (If you answered Yes at <b>question 20, 22</b> or <b>41</b> )	<input type="checkbox"/>
Council rates notice (If you answered Yes at <b>question 23</b> or <b>35</b> )	<input type="checkbox"/>
Documents showing details of the rental income (If you answered Yes at <b>question 30</b> or <b>42</b> )	<input type="checkbox"/>
Details of each additional property (If you have more than one investment property at <b>question 34</b> )	<input type="checkbox"/>
Title deed(s) for each property (If you answered Yes at <b>question 36</b> )	<input type="checkbox"/>
Documents of water rights, allocation or licence (If you answered Yes at <b>question 38</b> )	<input type="checkbox"/>
Details on amount owing for each loan secured by vehicles (If you answered Yes at <b>question 45</b> )	<input type="checkbox"/>
Documents showing balances and details of bank, building society and credit union accounts (If you answered Yes at <b>question 46</b> )	<input type="checkbox"/>
Statements or schedules for each fund, including latest council rates notices for any real estate held by SMSF and SAF (If you answered Yes at <b>question 47</b> )	<input type="checkbox"/>
Managed investment certificates or similar document (If you answered Yes at <b>question 48</b> )	<input type="checkbox"/>

## Continued

Share certificates or statement for each shareholding listed on a stock exchange (If you answered Yes at <b>question 49</b> )	<input type="checkbox"/>
Investment bond/debenture documents (If you answered Yes at <b>question 50</b> )	<input type="checkbox"/>
Details of the funeral bond(s) or funeral investment(s) (If you answered Yes at <b>question 51</b> )	<input type="checkbox"/>
Statement for each life insurance policy (If you answered Yes at <b>question 52</b> )	<input type="checkbox"/>
Receipts for all lump sum accommodation payments (If you answered Yes at <b>question 53</b> )	<input type="checkbox"/>
Money on loan documents (if available) and <b>Private Trust (Mod PT)</b> form (if required) (If you answered Yes at <b>question 54</b> )	<input type="checkbox"/>
Documents with details of payments by authorities or agencies outside Australia (If you answered Yes at <b>question 56</b> )	<input type="checkbox"/>
Personal income tax return(s), business income tax return, a profit and loss statement, depreciation schedule and any other explanatory notes of the business or company (If you answered Yes at <b>question 57</b> )	<input type="checkbox"/>
<b>Private Trust (Mod PT)</b> form (if required) (If you answered Yes at <b>question 58</b> )	<input type="checkbox"/>
<b>Private Company (Mod PC)</b> form (If required at <b>question 60</b> )	<input type="checkbox"/>
Documents with details on 'other' assets (If you answered Yes at <b>question 61</b> )	<input type="checkbox"/>
Documents with details on 'other' income (If you answered Yes at <b>question 62</b> )	<input type="checkbox"/>
Documents related to a signing on behalf of the person the assessment is for (If signing at <b>question 66</b> )	<input type="checkbox"/>

## Returning this form

Check that you have answered all the questions you need to answer, supplied all the documents as at the date you permanently moved into an aged care home or as at the date you are lodging this form and you have signed and dated this form.

Return this form to Services Australia unless you receive an income support payment from the Department of Veterans' affairs.

Services Australia  
Residential Care  
PO Box 7821  
Canberra BC ACT 2610

Department of Veterans' Affairs  
GPO Box 9998  
Brisbane QLD 4001

You should do this before you enter care (if possible) to make sure that your cost of care can be calculated as quickly as possible. If you enter aged care without having an assessment, you could be asked to pay the maximum aged care fees applicable.

**If you are authorising a person or organisation to enquire or act on your behalf, complete and return the form on the following pages separately.**



If you are receiving a Department of Veterans' Affairs (DVA) means tested payment (see notes page 2 of 4) you should complete and return the **Aged Care Request for a nominee for Department of Veterans' Affairs customers (AC019)** form.

# Authorising a person or organisation to enquire or act on your behalf

**centrelink**



## When to use this form

You can use this form to authorise a person or organisation to enquire or act on your behalf for Centrelink payments and services including Aged Care.



If you or your nominee have your Centrelink payments income managed, call **1800 132 594** before filling in this form.



## Protecting you and your information

If you think the access you have provided a person or organisation is being misused, call **132 850** or visit one of our service centres.

If you are affected by family and domestic violence, call **132 850** Monday to Friday, 8 am to 5 pm local time, and ask to speak to one of our social workers or call **000** if you are in immediate danger.

For more information, go to [servicesaustralia.gov.au/domesticviolence](http://servicesaustralia.gov.au/domesticviolence)



## For more information

For Child Support, Medicare or more information, go to [servicesaustralia.gov.au/authorisedrepresentative](http://servicesaustralia.gov.au/authorisedrepresentative)

If you need to call us, use your regular payment line.

To speak to us in your language, call **131 202**. Call charges may apply.

We can translate documents you need to give us for free.

If you have a hearing or speech impairment, you can contact the **TTY service** Freecall™ **1800 555 677**.

A TTY phone is required to use this service.

## Type of access you can request

The **information below** may help you to choose the type of access that best suits your needs and will assist you to answer Question 5. There are 4 different types of access that can be requested.

If you want to have a different correspondence nominee to your payment nominee, person permitted to enquire or person permitted to update, you will need to complete a separate form.

Your authorised person or organisations can:	Person permitted		Correspondence nominee	Payment nominee
	to enquire	to update		
Ask us questions about your payments or services	✓	✓	✓	✓
Tell us about changes to your circumstances	✗	✓	✓	✗
Respond to requests for information	✗	✓	✓	✗
Come to appointments with you or, if appropriate, on your behalf	✗	✗	✓	✗
Complete and sign forms and statements	✗	✗	✓	✗
Get copies of your letters	✗	✗	✓	✗
Get your Centrelink payments, and use them only for your benefit	✗	✗	✗	✓
View and update your information online	✗	✗	✓	✓
Claim payments and services for you	✗	✗	✓	✗

## Identity requirements

### Authorised person

Your authorised person will need to provide photo identification, at one of our service centres or agents, from the list at [servicesaustralia.gov.au/identity](http://servicesaustralia.gov.au/identity) For example, a current Australian driver licence or valid passport.

### Authorised organisation staff

Staff from your authorised organisation will need to verify their identity details when they create their Provider Digital Access (PRODA) account to access nominee online services. For more information, go to [servicesaustralia.gov.au/proda](http://servicesaustralia.gov.au/proda)

### Important information – type of access

When choosing your type of access, you should consider the following:

- you can only have **one** correspondence and **one** payment nominee. These can be different people. You will need to complete a separate form for each
- a person or organisation who is **both a correspondence and payment nominee** can enquire, act and get your Centrelink payments on your behalf
- the person you are authorising cannot have a nominee acting on their behalf
- you can still deal with us, even if you have authorised a person or organisation to assist you
- if you get more money from us than you are entitled to, you will need to repay this. Your nominee is not responsible for repaying this money
- if you have a nominee of the same type already in place, this request will automatically cancel the existing access. Your existing nominee will get a letter telling them of the cancellation.

### Person permitted to enquire or update – responsibilities and obligations



#### A person permitted to enquire or update:

- is required to use the information we give them to assist you to better understand your payment and services.



#### A person permitted to update:

- can provide us with information to update your payment and services
- must act in your best interest.

A person permitted to enquire or update cannot:

- make decisions for you
- sign forms or statements
- get copies of your letters.

You can authorise more than one person or organisation to be your person permitted to enquire or update.

### Correspondence and Payment nominee – responsibilities and obligations



#### A correspondence nominee is required to:

- let us know of any changes to your circumstances **within 14 days** (**within 28 days** if they are outside Australia)
- respond to notices, including providing requested information and reporting notifiable events. If they do not respond to a notice, it will mean that you (as the customer), did not meet your obligations. If applicable, your payments may be stopped
- act in your best interest
- let us know of any changes that may affect their ability to be your nominee.



#### A payment nominee is required to:

- use your Centrelink payments for your benefit
- keep records on how the money was spent. We can review these records at any time. If the payment nominee does not provide this information, financial penalties may be imposed on them
- act in your best interest
- let us know of any changes that may affect their ability to be your nominee.

### Aged Care matters

Your **person permitted to enquire** can ask questions only, and your **person permitted to update** can ask questions and make updates to your income and assets.

If you are accessing Aged Care services, your **correspondence nominee** will be able to:

- complete and sign forms about your Aged Care costs
- ask questions about your Aged Care costs
- update your income and assets
- get copies of your Aged Care letters.

**Your Aged Care payments will go directly to your Aged Care provider.**



# Authorising a person or organisation to enquire or act on your behalf (SS313)

## How to complete this form

You can complete this form on your computer, print and sign it.

**Part A and Part C** – collects the customer's details (the person requesting an authorised person or organisation) (pages 1 and 3).

**Part B and Part D** – collects the authorised person or organisation details (pages 2 and 4).

If you have a printed form:

- Print in BLOCK LETTERS using black or blue pen.
- Where you see a box like this  **GO** skip to the question number shown.

## Privacy notice

### You need to read this

#### Privacy and your personal information

The privacy and security of your personal information is important to us, and is protected by law. We collect this information to provide payments and services. We only share your information with other parties where you have agreed, or where the law allows or requires it. For more information, go to [servicesaustralia.gov.au/privacy](http://servicesaustralia.gov.au/privacy)

## Part A – Customer details (the person requesting an authorised person or organisation)

1 Your Centrelink Customer Reference Number (if known)

-  -  -

2 Your name

Mr  Mrs  Miss  Ms  Other

Family name

First given name

Second given name(s)

3 Your date of birth

4 Has your permanent home or postal address changed since you last told us?

No  **GO to question 5**

Yes  Give details below

Date of address change

Your permanent home address

Postcode

Your postal address (if different from above)

Postcode

5 Select the type of access you are requesting:

For more information, go to page 1 of the notes.

Tick all that apply



**Option 1: Person permitted to enquire**

They can ask questions about your payments and services. They cannot make updates to your payments and services.



**Option 2: Person permitted to update**

They can ask questions about your payments and services and provide information to update your payments and services.



**Option 3: Correspondence nominee**

They can ask questions about your payments and services, tell us about changes to your circumstances, complete and sign forms/statements, attend appointments with you or on your behalf (if appropriate) and get copies of your letters from us.



**Option 4: Payment nominee**

They can receive your Centrelink payments on your behalf. Provide your nominee's account details at **question 11**. This is not applicable for aged care.

6 How long do you want this type of access for?

Indefinitely  or until



CLK0SS313 2011



**Part B – Authorised person or organisation details**

**7 Tick one only**

Are you authorising a person or organisation?



Person  **GO** to Authorised person below

or



Organisation  **GO** to Authorised organisation below



**Authorised person**

The authorised person's Centrelink Customer Reference Number (if known)

-  -  -

The authorised person's name

Mr  Mrs  Miss  Ms  Other

Family name

First given name

Second given name(s)

The authorised person's date of birth

Other name(s) the authorised person has been known by

**Include:**

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

The authorised person's contact details

Permanent address

Postal address (if different from above)

Contact phone number

**GO to question 8**



**Authorised organisation**

The authorised organisation's Centrelink Reference Number (if known)

-  -  -

Trading name of organisation

Business name of organisation (if different from above)

Australian Business Number (ABN)

-  -  -

The authorised organisation's contact details

Permanent address

Postal address (if different from above)

Organisation's email

Name of contact person

Contact phone number

The authorised organisation will need to register their business for Provider Digital Access (PRODA) and Business Hub to use the Nominee Services online.

For more information, go to [servicesaustralia.gov.au/proda](http://servicesaustralia.gov.au/proda)

**GO to question 8**

## Part C – Customer declaration and Third Party authorisation

8

### Tick one only

I declare that I am able to make my own decisions  **GO to Customer Declaration** below

or

If the customer is not able to make their own decisions  **GO to Third Party authorisation** below


**Read this before continuing.** Make sure you have read **Privacy and your personal information** on page 1 of this form.

### Customer declaration

**If the customer is able to make their own decisions** but is not able to sign this form, it may be signed by their Power of Attorney.

Tick this box if a Power of Attorney is signing the customer declaration

Name of the Power of Attorney

 Provide a copy of the Power of Attorney. If there are multiple attorneys, you will need to copy this page and provide the name and signature of each attorney. Provide photo identification, such as an Australian driver licence or valid passport.


**I declare that** the information I have provided in this form is complete and correct.


**I authorise** the person or organisation named on this form, to deal with Centrelink and Aged Care on my behalf according to the type of access shown on this form.

#### I understand that:

- this is voluntary and I can cancel this arrangement at any time.
- the type of access may be rejected or cancelled at any time by Centrelink or Aged Care, if the person or organisation is not able to meet their responsibilities and obligations.
- giving false or misleading information is a serious offence.

Your signature


	Date DD/MM/YYYY
---	--------------------

 You have now completed **Part C**. The **authorised person or organisation** is to complete **Part D**.

**GO to question 9**

### Third Party authorisation

**If the customer is not able to sign this form** due to physical or mental disability and the type of access is in the person's best interest, a third party may sign this section on their behalf.

-  An appropriate third party may be one of the following and they must provide evidence as outlined below:
- a relevant professional, such as a treating doctor, nurse, case worker or social worker
    - provide a letter or the medical evidence of the customer's incapacity
  - the holder of an Enduring Power of Attorney
    - provide a copy of the legal document and medical evidence
    - provide photo identification, such as an Australian driver licence or valid passport
    - if there are multiple attorneys they must all provide a letter or signature with their agreement
  - the person or organisation holding a guardianship, financial management or administration order
    - provide a copy of the order.

Name of the third party

Relationship to customer

Address


Postcode


Contact phone number

#### I declare that:

- the customer is not able to sign this form due to physical or mental disability.
- it is in the customer's best interest to authorise the person or organisation named on this form, to deal with Centrelink and Aged Care on the customer's behalf according to the type of access shown on this form.
- the information I have provided in this form is complete and correct.

Signature of the third party

	Date DD/MM/YYYY
---	--------------------

 You have now completed **Part C**. The **authorised person or organisation** is to complete **Part D**.

**GO to question 9**

**Part D – To be completed by the authorised person or organisation**

9 Do you have any of the following:

- Power of Attorney
- Enduring Power of Attorney
- Guardianship
- Financial management/administration order
- None of the above



Provide a copy of any documents ticked above.

10 **PASSWORD** – For security purposes, we will ask for this password every time you contact us.

Provide a password

The password needs to have 4 to 12 letters or numbers.

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

**Payment nominee only to complete**

This is not applicable for Aged Care.

11 Will you be receiving payments on behalf of the customer?

No  **GO to question 12**

Yes  Give details below

**Complete this if you are a payment nominee.**

It may be easier as a nominee to manage the payments by having a separate account. As a nominee you must tell us if this account changes.

Name of bank, building society or credit union

Branch number (BSB)

Account number (this may not be your card number)

Account held in the name(s) of

For organisations only – Group Institution Code (if applicable)

**Authorised person or organisation declaration**

12 Make sure the authorised person and/or organisation details are correct in **question 7**.

For more information about the responsibilities and obligations as an authorised person or organisation, refer to the **Notes**.

Read **Privacy and your personal information** on page 1 of this form.

**I declare that I:**

- understand and accept the responsibilities and obligations for the type of access requested in this form.
- will act in the best interest of the customer.

**I understand that:**

- any personal information I am given access to under this type of access is protected under Commonwealth legislation. I agree to access, use or disclose the information only as authorised by the person to whom the information relates.
- the type of access may be rejected or cancelled at any time by Centrelink or Aged Care, if I am not able to meet my responsibilities and obligations.
- giving false or misleading information is a serious offence.

Signature of the authorised person or organisation

--


Date

DD / MM / YYYY
----------------

Your relationship with the customer (for example, parent, child, guardian).

--

## Checklist

-  Which of the following documents are you providing with this form?  
**Provide a copy of the relevant documents.** They do not need to be certified and will not be returned to you.

<b>Tick all that apply</b>	
<b>Customer declaration – I am able to make my own decisions (Question 8)</b>	
If the Power of Attorney completes the customer declaration, they will need to provide	
<ul style="list-style-type: none"> <li>• the Power of Attorney document                             <ul style="list-style-type: none"> <li>– if there are multiple attorneys, you will need to copy page 3 of the form and provide the name and signature of each attorney</li> </ul> </li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• photo identification, such as an Australian driver licence or valid passport</li> </ul>	<input type="checkbox"/>
<b>Third Party authorisation – the customer is not able to make their own decisions (Question 8)</b>	
If a third party provides authorisation, they must provide evidence as outlined below	
<ul style="list-style-type: none"> <li>• a relevant professional, such as a treating doctor, nurse, case worker or social worker                             <ul style="list-style-type: none"> <li>– a letter or the medical evidence of the customer's incapacity</li> </ul> </li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• the holder of an Enduring Power of Attorney                             <ul style="list-style-type: none"> <li>– a copy of the legal document and medical evidence of the customer's incapacity</li> </ul> </li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>– photo identification, such as an Australian driver licence or valid passport</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>– if there are multiple attorneys, they must all provide a letter or signature with their agreement</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• the person or organisation holding a guardianship, financial management or administration order                             <ul style="list-style-type: none"> <li>– a copy of the order</li> </ul> </li> </ul>	<input type="checkbox"/>
<b>If your authorised person or organisation holds any of the following, they will need to provide a copy of the documents (Question 9)</b>	
<ul style="list-style-type: none"> <li>• Power of Attorney</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Enduring Power of Attorney</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Guardianship</li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Financial management/administration order</li> </ul>	<input type="checkbox"/>

## Stopping or changing your type of access

You can cancel or change your nominee's type of access at any time, unless it is a court, tribunal, guardianship or an administration appointed arrangement.

To cancel the type of access:

- call us – go to [servicesaustralia.gov.au/phoneus](http://servicesaustralia.gov.au/phoneus)
- use your **online account** to cancel or change your correspondence and/or payment nominee at any time
- write to us – go to [servicesaustralia.gov.au/contactus](http://servicesaustralia.gov.au/contactus)

If you cancel your nominee a letter will automatically be sent to you and your nominee.

Centrelink may review, reject or cancel your type of access at any time. This includes if the person or organisation is not able to meet their responsibilities and obligations.

## Returning this form

Return this form and any supporting documents:

- **online** (excluding identity documents) using your Centrelink online account. For more information, go to [servicesaustralia.gov.au/centrelinkuploaddocs](http://servicesaustralia.gov.au/centrelinkuploaddocs)
- in person at one of our service centres, if you are not able to use your Centrelink online account.
- post to: Services Australia  
PO Box 7800  
CANBERRA BC ACT 2610
- fax to: **1300 786 102**

# Residential Aged Care Property details for Centrelink and DVA customers (SA485)



## About this form

We understand that entering into aged care can be a sensitive time.

If you are entering an aged care home, the Australian Government may subsidise your aged care fees. **This form collects details of your home so we can calculate the amount you will pay towards your residential aged care.**

A simpler digital version of this form is available online by going to [humanservices.gov.au/forms](http://humanservices.gov.au/forms) and selecting 'Aged Care Calculation of your cost of care'.



## Fee Estimator

You can get a estimate of the amount you may be asked to pay towards your residential aged care by going to [myagedcare.gov.au](http://myagedcare.gov.au) and searching for 'fee estimator'.

You can talk to a **Financial Information Service (FIS)** officer who will give you information about the financial aspects of aged care. Call us on **132 300** and say '**Financial Information Service**' when we ask why you are calling.



## For more information

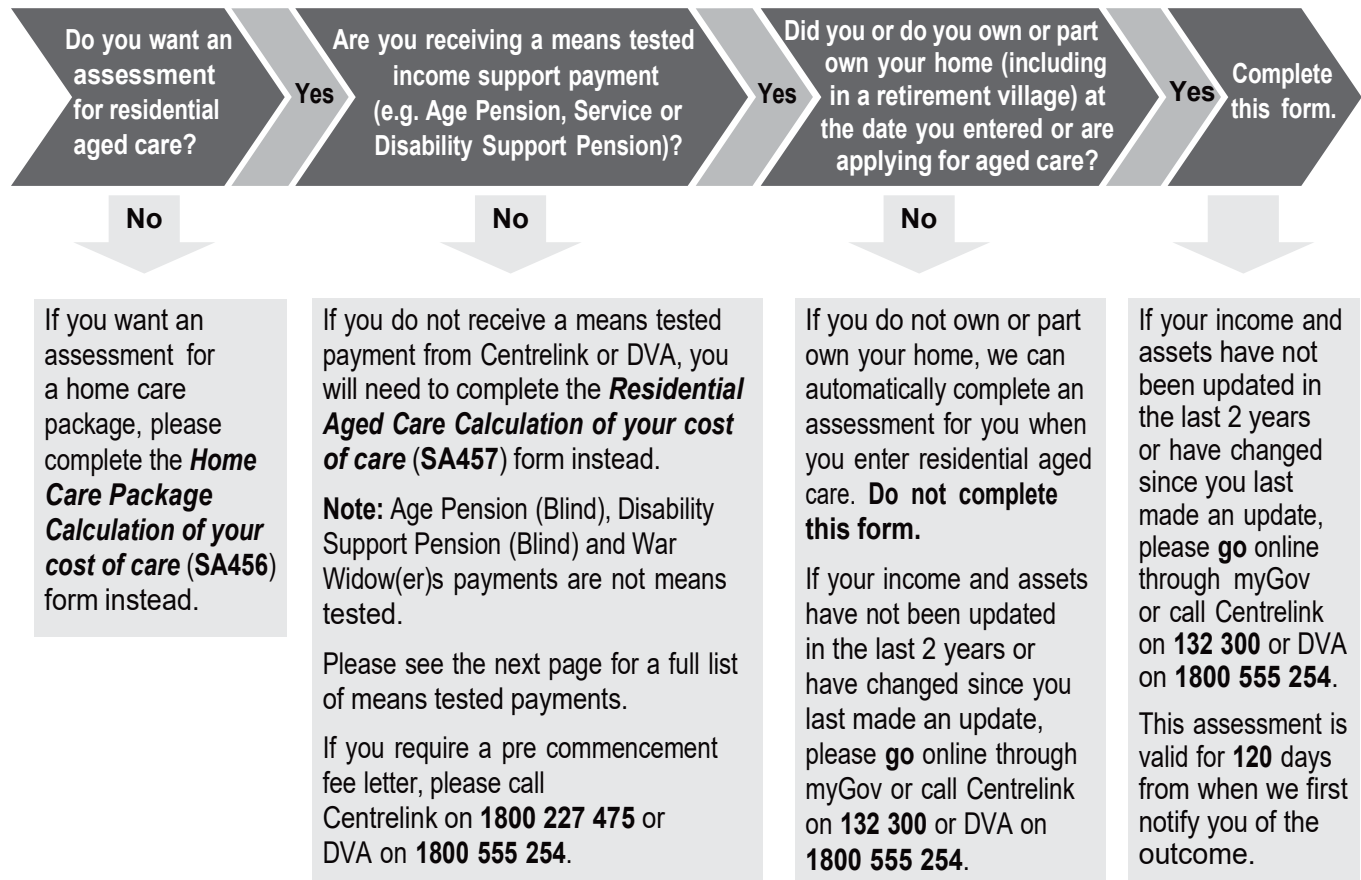
Go to our website [humanservices.gov.au/agedcare](http://humanservices.gov.au/agedcare) or call us on Freecall™ **1800 227 475**.

To speak to us in your language, call us on **131 202**. Call charges may apply.

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

If you receive a Department of Veterans' Affairs (DVA) payment, and would like to discuss your assessment you can call them on Freecall™ **1800 555 254**.

## When to use this form



**Keep these Notes (pages 1 to 4) for your information.**

**The following information is for your reference to help you fill in this form.**

**Calculating your cost of care**

All aged care residents may be asked to pay a basic daily fee. In addition, some residents may also be required to pay a means-tested care fee. This form is used to calculate the amount you will pay towards your cost of care.

There are annual and lifetime caps that apply to the means-tested care fee for residents who entered an aged care home after 1 July 2014. The Department of Human Services will write to you and your service provider once you have reached the annual or lifetime cap.

Some residents will have their accommodation costs paid in full or in part by the Australian Government. Others will need to pay the accommodation cost they negotiate with their aged care home provider.

---

**Income support payments**

**Non-means tested payments may include:**

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

**Means tested payments may include:**

- 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

**Who should complete this form?**

If you are receiving one of the Centrelink or DVA **means tested** payments listed above and own or part own your home (including in a retirement village), complete this form, as we need to collect information about your home to complete your assessment.

**Who should not complete this form?**

If you are not receiving any Centrelink or DVA payments OR you are receiving a Centrelink or DVA **non-means tested** payment listed above, **do not complete this form**, you will need to complete the **Residential Aged Care Calculation of your cost of care (SA457)** form, for us to calculate your cost of care. This is because we do not know enough about your income and assets to complete your assessment.

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

- you do not own or part own your home, **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.** We have enough information about you to complete your assessment.

## **Protected person for aged care purposes**

For aged care legislation purposes, a protected person is:

- your partner or dependent child
- your carer<sup>1</sup> who is eligible to receive an Australian Government income support payment and who has lived in your home with you for the past 2 years
- your close relative who is eligible to receive an Australian Government income support payment and who has lived in your home with you for the past 5 years.

If your home is occupied by a protected person, it may not be counted as an asset for aged care purposes.

Your carer or close relative will need to give their consent in this form to allow the Department of Human Services or DVA to check their eligibility for an income support payment.

This exemption may be lost if the protected person who has been living in the home, moves out of the home.

---

<sup>1</sup> It is not necessary for your carer to have received a Carer Payment or Carer Allowance in order to be considered a carer. However, at the date you enter care or complete this form your carer must meet the eligibility criteria for an Australian Government income support payment (notionally entitled person).

---

## **Retirement villages or independent living units**

Retirement villages or independent living units are not residential aged care homes and are not subsidised by the Australian Government. A retirement village provides accommodation for retirees (over the aged of 55). Independent living units are a housing option for older people who want to live independently.

Residents of retirement villages or those living in independent living units generally enter into an agreement that outlines how much they will pay to enter and the amount (if any) refundable after they leave. Following departure the amount refundable may be subject to this assessment.

---

## **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 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.



## Nominee

An aged care nominee is another person you nominate to deal with the Australian Government Department of Human Services (Centrelink) on your behalf for aged care purposes.

If you are in a residential aged care home you may authorise the aged care nominee to receive information from us about your care costs and they may give us information about your income and assets. If your nominee does not hold a power of attorney or similar, both you and your nominee will receive residential aged care letters from the Department of Human Services. You may vary or cancel the appointment of a nominee at any time by writing to us.

If you want a **nominee** for **aged care** purposes you will need to complete the nominee section at the back of the form.

If you have:

- Enduring Power of Attorney
- Guardianship order
- Appointment of Enduring Guardian
- Financial management/administration order

you will still need to complete this form.

Persons holding a valid financial power of attorney can also be accepted as having the authority to:

- act as a signatory for you
- receive income support related mail on your behalf.

If you want more information about nominee arrangements, go to our website **[humanservices.gov.au/nominees](http://humanservices.gov.au/nominees)** or call us on Freecall™ **1800 227 475**.

For information about the DVA authorised person arrangements, call DVA on Freecall™ **1800 555 254**.

**Keep these Notes (pages 1 to 4) for your information.**



# Residential Aged Care Property details for Centrelink and DVA customers (SA485)

## Filling in this form

- Please 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.


**Note:** You will see **entry/application date** in many of the questions located in this form. Below is a brief explanation of what the term means and what we need from you.

**Entry date** – If you are permanently living in an aged care home you need to answer the questions and provide the documentation based on your date of entry into the home. For example, if you permanently moved into an aged care home on 1 January 2019 you need to provide supporting documents that show your income and assets on the date you entered care.

**Application date** – If you have not moved into an aged care home you need to answer the questions and provide supporting documentation based on your current situation. For example, if you lodged the form on 10 January 2019 you need to provide supporting documents that show your income and assets on the date you lodged this form.


- 1 What type of care do you (the person who the assessment is for) want an assessment for?

A residential  Go to next question  
aged care home

A home care   Do not complete this form.  
package See *When to use this form*  
on the front page.


- 2 Do you receive a means tested income support payment from Centrelink or DVA?

For a list of means tested payments, refer to *Income support payments* in the **Notes Section**, on page 2 of the notes.

No   Do not complete this form. See *When to use this form* on the front page.

Yes  Go to next question

- 3 Did you or do you own your own home?

No   Do not complete this form. See *When to use this form* on the front page.

Yes  Go to next question

- 4 Are you completing this form on behalf of someone else?

For example, partner, parent or relative.

No  Go to next question

Yes  Give details below

Your full name

Your relationship to the person the assessment is for

**Note:** If you wish to be listed as a nominee for aged care purposes, you and/or the person this assessment is for will need to complete the nominee section at the back of this form. Nominees may be contacted by us regarding this assessment.

- 5 Do you (the person who the assessment is for) have a partner?

In this form we will collect information about your partner. If your partner would like an assessment, they need to complete a separate assessment form.

For this assessment, a partner can be either:

- a person you are legally married to, or who you were living with in a de facto relationship, but are now living apart on a permanent basis due to a **health related reason**, for example, if the person entered residential aged care
- a person you are legally married to, and normally live with on a permanent basis
- a person who lives with you in a de facto relationship, although you are not legally married to that person
- a person in a registered relationship.

No  Go to next question

Yes  We will be asking basic information about your partner.

If your partner would like an assessment, they need to complete a separate assessment form (SA485).

▶ Go to next question



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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)**

**6** Your name

Mr  Mrs  Miss  Ms  Other

Family name

First given name

Second given name

**7** Your date of birth

**8** Your Centrelink/DVA number

Centrelink Reference Number (if known)

Department of Veterans' Affairs reference number

Name of Department of Veterans' Affairs payment

**9** What is your home address or previous address if living in residential aged care?

**10** Postal address if different to home address

**Your partner (of the person the assessment is for)**

**6** Your partner's name

Mr  Mrs  Miss  Ms  Other

Family name

First given name

Second given name

**7** Your partner's date of birth

**8** Your partner's Centrelink/DVA number

Centrelink Reference Number (if known)

Department of Veterans' Affairs reference number

Name of Department of Veterans' Affairs payment

**9** Your partner's home address

**10** Your partner's postal address if different to home address

## Your assessment

To calculate your cost of care we will use the information we already have about your income and assets along with 'Your home details' being provided in this form.

If you do not want us to use the information we already have, you will pay the maximum means-tested care fee until you reach the annual or lifetime cap.

This means that your provider can require you to pay the basic daily fee, **maximum means-tested care fee** and **accommodation cost**.

If you do not want us to use your recorded information please contact us on **1800 227 475** to discuss.

### 11 What do you want this assessment for?

The entry/application date is the date you have entered care or the date you have lodged your form.

Tick **ONE** box **ONLY**

#### Option 1: You are planning on going into a residential aged care home

You will need to answer the questions in the form based on your current situation.

We will use the date you lodge the form as the entry/application date.

**Go to 12**

#### Option 2: You are now or were in a residential aged care home

You will need to answer the following questions based on your situation at the date of **entering the residential aged care home**.

What was that entry date?

**Go to 12**

#### Option 3: You have entered a residential aged care home before 1 July 2014

You are a residential aged care home resident who was already in permanent residential care **before 1 July 2014** and are thinking of having an assessment done under the current means testing rules as you are considering changing aged care provider.

**You will need to call us on Freecall™ 1800 227 475.**

## Dependent children

### 12 Please read this before answering the following question.

For aged care purposes, to be a dependent child the young person must be:

- under 16 years of age, **or**
- 16–24 years of age and receiving full-time education at a school, college or university, **and not** in full-time employment or receiving a Centrelink income support payment.

You must be legally responsible (whether alone or jointly with another person) for their day-to-day care, welfare and development, or under a legal obligation to provide financial support to them.

Do you (and/or your partner) have any dependent children/students in your care?

No  **Go to 14**

Yes  Give details below

Details of the **youngest** dependent child/student in your care.

Dependent family name

Dependent first given name

Dependent second given name

Dependent gender

Male

Female

Dependent date of birth

### 13 At the entry/application date did this dependent child/student live in the family home?

No

Yes

## Your home details

**14** Did you (and/or your partner) own or part-own your home at the entry/application date?

Answer 'Yes' to this question for situations including, but not limited to:

- you were paying off a mortgage on your home
- your home was in a retirement village and you had paid an entry contribution
- your home was owned by a private/family trust or a private company that was controlled by you (and/or your partner), **or**
- you have an agreement with somebody else who owns part of the home (business/family partnership).

No  **Go to 31**

Yes  What is your home address or previous address if you are now living in residential aged care?

Postcode

**15** Do you (and/or your partner) still own or part-own this home?

No  **Go to next question**

Yes  **Go to 17**

**16** Select the option that applies to you:

**Option 1: You sold your home**

How much was your home sold for?	\$ <input style="width: 90%;" type="text"/>
On what date was your home sold?	<input style="width: 20%;" type="text"/> / <input style="width: 20%;" type="text"/> / <input style="width: 20%;" type="text"/>

**Option 2: You transferred the title of your home to someone else**

How much was your home worth at the time the title was transferred?	\$ <input style="width: 90%;" type="text"/>
On what date was the title transferred?	<input style="width: 20%;" type="text"/> / <input style="width: 20%;" type="text"/> / <input style="width: 20%;" type="text"/>
Did you receive anything in return for the title transfer?	
No <input type="checkbox"/>	
Yes <input type="checkbox"/> How much did you receive?	
\$ <input style="width: 80%;" type="text"/>	

**Option 3: You vacated your home in a retirement village**

What amount was (or will be) paid to you (and/or your partner) when the retirement village unit was (is) vacated?	\$ <input style="width: 90%;" type="text"/>
When was (or will) this amount be paid to you (and/or your partner)?	<input style="width: 20%;" type="text"/> / <input style="width: 20%;" type="text"/> / <input style="width: 20%;" type="text"/>



Provide documentation which gives details of the sale of your home, the details of the transfer or details of the retirement village agreement.

For example:

- a solicitor's letter
- documentation which gives details of the sale/transfer of your home
- what has been done with the proceeds
- bank statements and agreements.

► **Go to 28**

17 At the entry/application date, was your home a:

- retirement village unit
- mobile home or motor home
- caravan
- boat?

No  Go to next question

Yes  Give details below

Type of asset <input style="width: 100%;" type="text"/>	
Estimated market value \$ <input style="width: 150px;" type="text"/>	Balance of loan(s) \$ <input style="width: 150px;" type="text"/>
Who owns your home?	
Your share <input style="width: 50px;" type="text"/> %	Your partner's share <input style="width: 50px;" type="text"/> %
Other's share <input style="width: 50px;" type="text"/> %	
Do you have a partner who is living in your home at the entry/application date?	
No <input type="checkbox"/> Go to 23	
Yes <input type="checkbox"/> Go to 23	

Provide documentation on the value of the mobile home/caravan/boat, refundable entry contributions or property.  
Provide a copy of a statement showing the amount owing for any loans.

18 What type of property is your home:

House

Townhouse (including duplex/triplex)

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

Unit/flat

How many units/flats are in the block?

Part of a farming property

Other  Give details below


19 Select the **option** that applies to you and answer the questions based on the entry/application date:

**Option 1: Small Property, Suburban block or Apartment/unit**

My home is on land up to and including 5 acres (2 hectares)  Give details below

Estimate the market value of your property including the buildings \$ <input style="width: 150px;" type="text"/>	Balance of loan(s) for your property \$ <input style="width: 150px;" type="text"/>
Who owns your home as shown on the property title?	
Your share <input style="width: 50px;" type="text"/> %	Your partner's share <input style="width: 50px;" type="text"/> %
Other's share <input style="width: 50px;" type="text"/> %	
Do you have a partner who is living in your home at the entry/application date?	
No <input type="checkbox"/> Go to 20	
Yes <input type="checkbox"/> Go to 23	

If you have a mortgage provide a copy of a statement showing the amount owing for each mortgage.

**Option 2: Large Property or Large Suburban block**

My home is on land over 5 acres (2 hectares)  Give details below


For example, if your home is on a 20 acre property provide separate estimated values for the home and the first 5 acres of land in the first box and the remaining 15 acres in the second box.	
Estimate the market value of the first 5 acres of your property including the buildings \$ <input style="width: 150px;" type="text"/>	Estimate the market value of the remaining acreage \$ <input style="width: 150px;" type="text"/>
Balance of loan(s) for your property \$ <input style="width: 150px;" type="text"/>	
Who owns your home as shown on the property title?	
Your share <input style="width: 50px;" type="text"/> %	Your partner's share <input style="width: 50px;" type="text"/> %
Other's share <input style="width: 50px;" type="text"/> %	
Do you have a partner who is living in your home at the entry/application date?	
No <input type="checkbox"/> Go to 20	
Yes <input type="checkbox"/> Go to 20	

If you have a mortgage provide a copy of a statement showing the amount owing for each mortgage.

20 What is the legal description of the property (e.g. lot, section, parish, etc.)?

**Note:** This information can be found on a rates notice. If the property is made up of more than one title, provide details for each separate title.

Four empty text boxes for providing the legal description of the property.

 Provide a copy of the council rates notice.

21 What is the area or dimension of the property?

**Note:** You do not need to answer this question if your home is a unit or flat.

Complete **ONE** of these measurements only.

Area in hectares

**OR** Area in acres

**OR** Area in square metres

**OR** Dimensions  X

22 Describe all buildings on the property

This will help us to value the property.

**1** What is the approximate floor area in square metres?  How old is the building?

Type of construction  
Exterior (e.g. brick, timber)   
Interior (e.g. plaster, not lined)   
Roof (e.g. iron, tiled)

General condition (e.g. fair, good, poor)

Total number of flats/units in complex (if applicable)

For residential building, number of bedrooms

Number of other rooms (excluding laundry, bathroom, toilet)

If you (and/or your partner) have more than 1 building on this property, provide a separate sheet with details.

23 Are you (and/or your partner) using any rooms or buildings in your home property solely for business purposes?

This includes rooms used for a bed and breakfast or a room/office used solely for running a business.

No  **Go to next question**

Yes  Value of the rooms or buildings of your home property used only for business

\$

24 Is any portion of the land surrounding your home property used primarily for business purposes?

This includes using the land for cultivation, orchards, grazing animals or accessed for other reasons such as camping sites.

No  **Go to next question**

Yes  Estimated value of the portion of the land (up to 2 hectares or 5 acres) surrounding your home property that you own and that is used primarily for business purposes

\$

25 Is your home part of a farm property?

No  **Go to 27**

Yes  Farm property primarily used for (e.g. grazing, wheat, hobby)

26 Is the farm property currently operational/viable?

No

Yes

Is it possible to subdivide the farm property or farm home?

No

Yes


List any other constructions located on the property (e.g. workers' quarters, manager's house)

Three empty text boxes for listing other constructions on the property.

If you need more space, provide a separate sheet with details.

27 Did you (and/or your partner) receive rental income from your home property at the entry/application date?

No  Go to next question

Yes   Provide documents showing details of the rental income and the outgoings (costs) for each property.

28 At the entry/application date, did any of the following people live in your home?

**Tick all that apply.** If there is more than 1 person provide a separate sheet for question 28 to question 30.

A person caring for you, who has occupied the home for at least 2 years  Go to 29

Close relative: your sister, brother, child, grandchild, or parent who has occupied the home for at least 5 years  Go to 29

None of the above  Go to 31

29 Does this person still live in the home?

No  Date vacated

Go to next question

Yes  Go to next question

## Consent by carer or close relative

30 Please read this before answering the following question.

The Department of Human Services or the Department of Veterans' Affairs needs to verify the period that your carer or close relative had occupied your home and that they were eligible to receive an income support payment at the entry/application date.

### Carer or close relative to complete

Make sure you have read the **Privacy and your personal information** on page 8 of this assessment and you have read the 'Protected Person' section on page 3 of the **Notes**.

### Consent by carer or close relative

Details of carer or close relative

Family name

First given name

Second given name

Date of birth

Centrelink Reference Number (if known)

-  -  -

OR

Department of Veterans' Affairs reference number

Relationship to the applicant

Phone number

(

**I consent to the Australian Government Department of Human Services or the Department of Veterans' Affairs using information collected from me for income support payment purposes and for the additional purpose of determining the value of the applicant's assets under the Aged Care Act 1997.**

Signature of carer or close relative



Date

## Privacy notice

### 31 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. This information is required to process your application or claim.

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 our website [humanservices.gov.au/privacy](http://humanservices.gov.au/privacy)

## Declaration for the person the assessment is for

### 32 Please read this before continuing.

If you (the person who the assessment is for) are not able to sign this declaration, it should be signed by someone who is authorised to sign on your behalf. The authorised person must also sign question 33. See 'Person signing on your behalf' section on page 3 of the **Notes**.

#### 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 the person the assessment is for (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.

33

## 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 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 2 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

Questions continue next page ►



# Aged Care Request for a nominee

A nominee is another person you wish to nominate to deal with the Australian Government Department of Human Services (Centrelink) or Department of Veterans' Affairs on your behalf for aged care purposes.

If your nominee has:

- Enduring Power of Attorney
- Guardianship order
- Appointment of Enduring Guardian
- Financial management/administration order

you will still need to complete this form to have a nominee for aged care legislative purposes.

If you are affected by family and domestic violence, call **132 850** Monday to Friday, between 8 am and 5 pm, local time and ask to speak to a departmental social worker.

For more information, go to [humanservices.gov.au/domesticviolence](http://humanservices.gov.au/domesticviolence)

## Privacy notice

### 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. This information is required to process your application or claim.

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 our website

[humanservices.gov.au/privacy](http://humanservices.gov.au/privacy)

## Part A – Nominee request completed by the person the assessment is for

- 1** Do you want to request a nominee for aged care as part of this form?

No  **Go to Checklist on page 13**

Yes  **Go to next question**

- 2** Is this request for a person or an organisation?

This request can be for a person such as a relative or friend or for an organisation such as public trustee organisations, guardianship boards and financial advisers.

#### Tick ONE box only

Request for a person  **Go to next question**

Request for an organisation  **Go to 4**

- 3** Your requested nominee's details (the person you are requesting to be your nominee)

Family name

First given name

Your requested nominee's date of birth

 / / **Go to 5**



## Declaration for the person the assessment is for

### 7 Please read this before continuing.

Make sure you have read the **Privacy and your personal information** on page 9.

If you (the person who the assessment is for) are unable to sign this declaration, it should be signed by someone who is authorised to sign on your behalf.

#### Your declaration

**I declare that** the information I have provided in this form is complete and correct.

**I authorise** the person or organisation named on this form, to deal with Centrelink on my behalf for aged care purposes only, according to the arrangement shown on this form.

#### I understand that:

- if my arrangement is voluntary, I can cancel it at any time.
- the arrangement may be rejected or cancelled at any time by the Australian Government Department of Human Services (Centrelink), if the person or organisation is not able to meet their responsibilities and obligations.
- giving false or misleading information is a serious offence.

If you have a physical or mental disability and are unable to sign this form ► **Go to 8**

#### Your signature

Date

► **Go to 9**

### 8 Third party authorisation

If the customer is not able to sign this form due to physical or mental disability and the nominee arrangement is in the person's best interest, a third party may sign this section on their behalf.

For example, an appropriate third party may be:

- a professional like a treating doctor, nurse, case worker or social worker, **or**
- the Enduring Power of Attorney if it has been made, **or**
- the person or organisation appointed by a guardianship board, court or tribunal as the customer's guardian or administrator.



You will need to provide evidence of the person's inability to sign if the arrangement is not court appointed.

Provide a letter from the treating doctor or a copy of the medical evidence of the customer's incapacity or inability to sign this form.

Name of person signing on behalf of the customer

Relationship to customer

Address

Postcode

Contact phone number

#### Third party declaration

**I declare that:**

- the customer is not able to sign this form due to physical or mental disability.
- it is in the customer's best interest to authorise the person or organisation named on this form, to deal with Centrelink on the customer's behalf according to the arrangement shown on this form.
- the information I have provided in this form is complete and correct.

Signature of the person signing on behalf of the customer

Date

**Part B – To be completed by your nominee for aged care purposes**

PASSWORD – For security purposes, we will ask for this password every time you contact us.

- 9 Provide a password for your aged care nominee arrangement.

The password needs to have 4 to 10 letters or numbers.

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10 **Acceptance by the nominee for aged care purposes**


Make sure your personal and/or organisation details are correct in **Part A**.  
For more information about your obligations as a nominee for aged care purposes, refer to the **Notes**.  
Make sure you have read the **Privacy and your personal information** on page 9.

**I declare that** I understand and accept the responsibilities and obligations for the arrangement requested in this form.

**I understand that:**

- any personal information I am given access to under this arrangement is protected under Commonwealth legislation. I agree to access, use or disclose the information only as authorised by the person to whom the information relates.
- my appointment as a nominee for aged care purposes may be revoked or suspended by the Australian Government Department of Human Services if I do not comply with my responsibilities and obligations.
- giving false or misleading information is a serious offence.

Signature of the nominee for aged care purposes


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Date

	/		/	
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**Part C – Checklist for the person the assessment is for**

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

Where you are asked to provide documents, provide copies only. 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 legal document and/or relevant authorisation (If required for <b>question 6 of the nominee section</b> )	<input type="checkbox"/>
A letter from the treating doctor or a copy of the medical evidence of the customer's incapacity or inability to sign this form (if required for <b>question 8 of the nominee section</b> )	<input type="checkbox"/>

Go to next page ►

## Checklist

Which of the following 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	
Details of the sale of your home or details of the transfer or retirement village agreement (If you answered Yes at <b>question 16</b> )	<input type="checkbox"/>
Details on value of mobile home/caravan/boat, refundable entry contributions or property (If you answered Yes at <b>question 17</b> or <b>19</b> )	<input type="checkbox"/>
Statement showing the amount owing for each mortgage (If you answered Yes at <b>question 17</b> or <b>19</b> )	<input type="checkbox"/>
Council rates notice (If you answered Yes at <b>question 20</b> )	<input type="checkbox"/>
Documents showing details of the rental income (If you answered Yes at <b>question 27</b> )	<input type="checkbox"/>

## Returning your form

Check that you have answered all the questions you need to answer, supplied all the documents as at the date you permanently moved into an aged care home or as at the date you are lodging this form and you have signed and dated this form.

- **Department of Human Services**

if you receive an income support payment from the Department of Human Services, return your form and any additional documents to:

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

- **Department of Veterans' Affairs**

if you receive an income support payment from the Department of Veterans' Affairs, return your form and any additional documents to:

**Department of Veterans' Affairs**  
**GPO Box 9998**  
**Brisbane QLD 4001**

You should do this before you enter care (if possible) to make sure that your cost of care can be calculated as quickly as possible. If you enter aged care without having an assessment, you could be asked to pay the maximum aged care fees applicable.