

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 are affected by family and domestic violence, there is help available. Call **132 850** Monday to Friday, 8am to 5pm local time, and ask to speak to a social worker. Otherwise, you can contact 1800RESPECT (**1800 737 732**), a 24 hour service. If you are in immediate danger, call **000**. For more information, go to servicesaustralia.gov.au/domesticviolence

If you think the arrangement you have given a person or organisation is being misused, you can call us on your regular payment line, or call **132 850** Monday to Friday from 8 am to 5 pm, or visit one of our service centres.



For more information

For Child Support, Medicare or more information, go to 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 call the **TTY service** on **1800 810 586**. A TTY phone is required to use this service.

Type of arrangement you can request

The **information below** may help you choose the type of arrangement that best suits your needs and will assist you to answer question 5. There are 4 types of arrangements 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

Power of Attorney or authorised person

The **Power of Attorney** or **authorised person** of the customer will need to provide photo identification in person at one of our service centres, agents or access points to have their identity verified. For example, a current Australian driver licence or valid passport can be provided – for a full list, go to servicesaustralia.gov.au/identity

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

Important information – type of arrangement

When choosing your type of arrangement, 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 and aged care fee assessment 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 arrangement. 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 calculation of your cost of care

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 for calculation of your aged care cost of care
- ask questions about your aged care cost of care
- update your income and assets
- get copies of your aged care cost of care letters.

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How to complete this form

You can fill this form digitally in some browsers, or you can open it in Adobe Acrobat Reader. If you do not have Adobe Acrobat Reader, you can print this form and complete 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/privacypolicy

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 Mx Other

Family name

First given name

Second given name(s)

3 Your date of birth (DD MM YYYY)

4 Your permanent home address

Postcode

Your postal address (if different from above)

Postcode

Has your permanent home or postal address changed since you last told us?

No **GO to question 5**

Yes Date of change (DD MM YYYY)

5 Select the type of arrangement 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**.

6 How long do you want this type of arrangement for?

Indefinitely or until (DD MM YYYY)



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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 Mx Other

Family name

First given name

Second given name(s)

The authorised person's date of birth (DD MM YYYY)

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 (including area code)

Email

GO to question 8



Authorised organisation

The authorised organisation's Centrelink Customer Reference Number (if known)

Trading name of organisation

This is not the contact person. The name of the contact person is to be provided at the end of this question.

Business name of organisation (if different from above)

Australian Business Number (ABN)

This is mandatory when nominating an organisation.

The authorised organisation's contact details

Permanent address

Postcode

Postal address (if different from above)

Postcode

Organisation's email

Name of contact person

Contact phone number (including area code)

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

GO to question 8

Part C – Customer declaration and Third Party authorisation

8

Tick one only

I declare that I am able to **GO** to **Customer Declaration** below


OR If the customer is not able to **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

-  The Power of Attorney needs to provide:
- a copy of the legal documents
 - photo identification for the attorney, such as an Australian driver licence or valid passport
 - if there are multiple attorneys with majority or joint decision making, you will need to copy this page and provide the name and signature of each attorney.

Name of the Power of Attorney

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 Services Australia on my behalf according to the type of arrangement shown on this form.

I understand that:

- this is voluntary and I can cancel this arrangement at any time.
- the type of arrangement may be rejected or cancelled at any time by Services Australia, 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 arrangement 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, for example, 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 (financial and/or legal decisions)
 - provide a copy of the legal document and medical evidence
 - provide photo identification for the attorney, such as an Australian driver licence or valid passport
 - if there are multiple attorneys with majority or joint decision making, 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 or certificate.

Will receiving Centrelink or aged care letters cause distress or confusion for the customer? No Yes

Name of the third party

Relationship to customer

Address

Postcode

Contact phone number
(including area code)

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 Services Australia on the customer's behalf according to the type of arrangement 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 (financial and/or legal decisions)
- Enduring Power of Attorney (financial and/or legal decisions)
- Guardianship order
- 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 if you are only accessing aged care services.

11 Will you be receiving payments on behalf of the customer?

No **GO to question 12**

Yes – by deposit into account Give Deposit account details below

Yes – by group payment Give Group payment 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.

Deposit account

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

Group payment

Group Payment organisations – enter 3 character 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 arrangement 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 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.
- the type of arrangement may be rejected or cancelled at any time by Services Australia, 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

Tick one only

- Parent of customer
- Child of customer
- Legal guardian
- Partner
- Sibling
- Grandparent of customer
- Grandchild of customer
- Other relative
- Organisation
- Professional

Other Give details below

Checklist

Identity requirements – Authorised person – (question 7) or Power of Attorney (question 8)

- authorised person, or
- Power of Attorney, either completing the customer declaration or Third Party authorisation section, is required to provide photo identification in person at one of our service centres, agents or access points. For locations go to servicesaustralia.gov.au/findus.



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.

Tick all that apply	
Customer declaration – I am able to make my own decisions (question 8)	
If the Power of Attorney completes the customer declaration, they will need to provide	
• the Power of Attorney (financial and/or legal decisions) document – if there are multiple attorneys with majority or joint decision making, you will need to copy page 3 of the form and provide the name and signature of each attorney	<input type="checkbox"/>
• photo identification for the attorney, has been provided in person to a service centre, agent or access point	<input type="checkbox"/>
Third Party authorisation – the customer is not able to make their own decisions (question 8)	
If a third party provides authorisation, they must provide evidence as outlined below	
• a relevant professional, for example, a treating doctor, nurse, case worker or social worker – a letter or the medical evidence of the customer's incapacity	<input type="checkbox"/>
• the holder of an Enduring Power of Attorney (financial and/or legal decisions) – a copy of the legal document and medical evidence of the customer's incapacity	<input type="checkbox"/>
– photo identification for the attorney, has been provided in person to a service centre, agent or access point	<input type="checkbox"/>
– if there are multiple attorneys with majority or joint decision making, they must all provide a letter or signature with their agreement	<input type="checkbox"/>
• the person or organisation holding a guardianship, financial management or administration order – a copy of the order or certificate	<input type="checkbox"/>
If your authorised person or organisation holds any of the following, they will need to provide a copy of the documents (question 9)	
• Power of Attorney (financial and/or legal decisions)	<input type="checkbox"/>
• Enduring Power of Attorney (financial and/or legal decisions)	<input type="checkbox"/>
• Guardianship order	<input type="checkbox"/>
• Financial management/administration order	<input type="checkbox"/>

Stopping your arrangement

You can cancel your arrangement at any time, unless it is a court, tribunal, guardianship or an administration appointed arrangement.

If you cancel your nominee arrangement, a letter will automatically be sent to you and your nominee.

To cancel the type of arrangement:

- call us – go to 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

Centrelink may review, reject or cancel your type of arrangement 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
- post to: Services Australia, PO Box 7800, CANBERRA BC ACT 2610
- fax to: 1300 786 102
- in person at one of our service centres.