

CLAIM LODGEMENT PROCESS FOR INCOME PROTECTION

Coverforce Pty Limited (AFSL 260668) are the insurance broker for the MEU Qld and they assist in the claims lodgement process. Coverforce act as agent of MEU Qld and its Members. Should you have any questions regarding any part of your claim form or the claims process, please call Coverforce on 07 3613 7911 during business hours or email us at admin@coverforce.com.au.

Step 1 - Complete all parts of the claim form and include:

- > Sections A, D & F with as full and complete answers as possible. Use additional pages if required.
- > Sections B & C if your claim relates to Injury, Sickness or Additional Benefits
- > All doctors certificates these must include the disabling condition
- > Have your doctor complete the Doctors statement
- > Include copies of 2 most recent pay-slips
- > Bank deposit details
- > Completed Medicare Form
- > Completed Tax File Declaration

Please note there will be delays in receiving your benefit if the above are not included in your claim.

Step 2: Send in your claim form

Before sending your claim please ensure:

- 1. All items in step 1 have been completed.
- 2. All necessary documentation required to support your claim is sent with the claim form.
- 3. You keep a copy of your claim form and supporting documentation for your records.

Send your claim form and supporting documentation to:

Attn: Claims Department Coverforce Pty Limited Locked Bag 5273 Sydney NSW 2001

To speed up the process for lodgment its recommended to scan your completed and signed Claim Form and email it to: newclaims@coverforce.com.au

Step 3: Claim confirmation

Coverforce will confirm receipt of your claim and lodge it with the insurer, we will also:

- > ensure you have provided all the information needed by the underwriter;
- > confirm receipt of your claim;
- > provide you with the insurer's claim number;
- > give you a contact number to discuss the progress of your claim.



INSURANCE CLAIM FORM - PERSONAL INJURY OR SICKNESS

Α	This section to be o	completed for	all claims							
	Mr / Mrs / Miss / Ms	Surname			F	irst Name(s)				
	Date of Birth	/	/	Height			Weight			
<u>s</u>	Residential Address		State P'Code							
Deta	Postal Address	Write 'as above' if san	ne as residential address							
olicy	Telephone	Private		Busines	ss		Mobile			
Personal Information & Policy Details	Email Address			Would you like to receive all your correspondence via email?				No □	Yes □	
rmat	Occupation									
Info	Employer	Mine/Pitt/Division:								
onal	Describe the usual du									
	Gross Weekly Income recent play slips (Only required where income)									
	Bank Details	BSB		Bank			Account Nu	mber		
	Account Name									
В	This section only t	o be complete	ed for Injury or S	ickness	claims					
	Please describe the	Please describe the nature of the Injury or Sickness								
	If Injury, describe how and where it occurred HOW: WHERE:									
Injury/Sickness Claims	What date did the Injury occur or Sickness first manifest?									
ess (Date medical treatm	Date medical treatment first sought?								
ickn	Are you now, or hav	e you been un	able to work?	١	۱۰	res Date	ceased work	/	/	
ury/8	Have you returned t	o work on eith	er a full-time or pa	art-time ba	asis?	Full-ti	me 🛚	Part-time		
Ē	Date resumed worki	ing		Full-	-time:		Pa	art-time:		
	If part-time, hours/da	ays working pe	er week							
	Current duties	Current duties								
	Details of your usua	l doctors / gen	eral practitioners	(required	from whe	en condition first	manifested)			
	Name of Current Do	octor								
	Name of Clinic / Pra	ictice								
	Address									
	Contact Numbers		Telephone:		Fax:		Em	nail:		
	Years Attending Clir	ending Clinic Years								
	Below needed if le	ss than 2 yea	rs with current D	octor						
	Name of Previous Doctor									
	Name of Clinic / Pra	ractice								
	Address									
	Contact Numbers		Telephone:		Fax:		Em	nail:		
	Years Attending Clir	nic	Ye	ears						



D	etails of treatment sought for t	this injury/sickness							
Ν	Name of attending doctor								
A	ddress								
T	elephone number		Date trea	tment firs	st sought	/	/		
	ave you ever suffered from a sim e past?	nilar injury/sickness in	No □	Yes 🗖 (P	lease provide details)				
D	etails								
D	etails of any hospital treatmen	t/admission for this I	njury/Sickno	ess					
N	ame and suburb of hospital								
D	ate of admittance	/ /	Date of dis	scharge	/	/			
	ny Surgical Procedure and if es then brief description?		Date of Su Procedure		/	/			
D	etails of any alcohol or drugs of	consumed during the	24 hours p	rior to the	e injury				
Α	Icohol (type and quantity)								
0	ther drugs (type and quantity)								
D	etails of any medical or surgica	al treatment or advic	e received i	n the last	5 years				
Р	lease provide:								
>	Nature of condition								
>	Date(s) condition occurred/ma	anifested							
>	Treatment undertaken								
>	Names and address of treating doctor(s)								
D	etails of any long term of chronic disability you've suffered								
Р	lease provide:								
>	Nature of condition								
>	Treatment undertaken								
>	Name and address of treating								
	doctor(s)								
С	omplete this Section only if yo	ou are claiming for an	y of the ben	efits belo	ow				
Р	lease tick the benefits you are cla	aiming:							
☐ Income Protection ☐ Death or Capital Benefit ☐ Funeral Benefit Not all policies provide all of the benefits shown									
В	enefit Level (please specify)								
-	his								
	his section to be completed for		No 🗆	Yes	☐ (Please provide deta	ails)			
5	re you a member of a private hea o you have Ambulance Cover?	aiui Iuliu <i>!</i>	No E						
Α	re you claiming Insurance or any ther Entity, Insurance or otherwis				(Please provide deta	ails)			

С

Additional Benefits

D

Other



	Name of Insurer/Entity						
	Telephone Number						
	Details of Claim made or Benefit expected						
	Income Benefit Claimed						
	Other Benefits Claimed						
Е	Privacy Statement						
Privacy Statement	Date of Birth						
	the insured, other insurers and reinsurers, insurance references bureaus, law enforcement agencies, lawyers, assessors, repairs, advisers and the agent of any of these, insurance broker, insurance agent or other intermediary, my employer or Australian Financial Complaints Authority for the purpose of administering my claim or providing a report.						
	Signed Date						
F	This section to be completed for all claims						
Declaration & Authorisation	 I declare that: the information contained in this form and any documents attached, is correct and complete; I have not withheld any information that could affect this claim; I am the Insured Person or a nominated beneficiary of the Insured Person covered by the Policy; I understand and agree to the above Privacy Statement I authorise: Lloyds of London (or its appointed agents) to collect, use and disclose my personal information that amounts to sensitive information under the Act, as is relevant to this claim. Any police officer, airline official or other person who has attended me to supply copies of any and all information relevant to any claim to Lloyds of London or its appointed representatives. A photocopy or facsimile of this authority shall be as effective as the original. Lloyds of London (or its appointed representatives) to give to, or obtain from, other insurers or insurance reference bureau any information relevant to this claim. 						
	Your Signature Date						



	Name (please print)					
G	Union Authorisation & Confirmation					
ıtion	I declare that to the best of my knowledge: the information supplied in this form and any documents attached, is correct and complete; information that could affect this claim has not been withheld; I know the insured Person. > >					
on & Authorisation	Lodge Executive Officer Signature		Name of Union Lodge	e		
atio	Print Full Name		Mobile Number			
Declaration &	I hereby authorise to have the above Union delegate kept I understand that neither the underwriter (nor its appointe responsible for disclosing any information whatsoever rela-	ntative) or Coverforce (an				
	Claimant		Signature Da	te		



INSURANCE CLAIM FORM - PERSONAL INJURY OR SICKNESS

Attending Medical Practitioner's Statement

Any fees in relation to the completion of this form are the responsibility of the claimant.

Patient's Full Name								
Date of Birth								
Height		cms		Weight	kgs			
What is disabling the pa (Please provide full descrip		on including natu	re and location of any inju	ry)				
Is the condition which is disabling the patient an injury or illness? Injury Illness Injury Injury Illness Injury Illness Injury In								
Does the patient have a the disablement, or pro	any other cor long recover	ndition which m y?	ay be contributing to	No □	Yes ☐ (Please provide details below)			
Details								
Is the condition either of	aused or exa	acerhated by th	e natient narticinating					
in any sporting activity?		docibated by th	e patient participating	No 🗖	Yes ☐ (Please provide details below)			
Details								
Date injury occurred or	symptoms fir	rst manifested:						
Date you were first con	sulted for this	s condition:						
Has the patient ever su	iffered from th	he same or a si	milar condition:	No □	Yes ☐ (Please provide details below)			
Details								
How long have you bee	on the nation	t's doctor/modia	cal practitionar?					
			cai practitioner:					
Name of patient's usua			ati alia ata do	Ni- D	V D			
Has the patient undergo	Has the patient undergone surgery, or is surgery anticipated? No □ Yes □ (Please provide details below)							
Details								
Date surgery performed	d or anticipate	ed:/		Name of	Hospital:			
Has the patient undergone any other tests/services/procedures (including pathology tests)? No □ Yes □ (Please provide details below)								
Details								
Was the patient referre	d to you?	No □ Yes □	l (Please provide deta	ils below o	f referring doctor)			
Details								



Is the patient still disabled?	No		When did the patient return to work?/				
	Yes		When do you anticipate the patient being able to return to work?				
			Full-time:/				
			Part-time:/				
If unable to perform all of the usua many hours per week?	l duties	of their occ	cupation, please advise what duties the patient could perform and for how				
Has the patient requested medical							
current condition to be issued to any other entity; insurance or otherwise?			No ☐ Yes ☐ (Please provide details below)				
Details							
Any other comments relating to the	e patient	t's current	condition or any other relevant factors affecting the condition of the				
patient's ability to return to work?	o panom						
Signature of Medical Practitioner							
Name (please print)							
Qualifications							
Address							
Telephone Number			Fax Number				
Email Address							

Tax file number declaration

Information you provide in this declaration will allow your payer to work out how much tax to withhold from payments made to you.

- This is not a TFN application form.
 To apply for a TFN, go to ato.gov.au/tfn
- Terms we use

When we say:

- payer, we mean the business or individual making payments under the pay as you go (PAYG) withholding system
- **payee**, we mean the individual being paid.

Who should complete this form?

You should complete this form before you start to receive payments from a new payer – for example:

- payments for work and services as an employee, company director or office holder
- payments under return-to-work schemes, labour hire arrangements or other specified payments
- benefit and compensation payments
- superannuation benefits.
- You need to provide all information requested on this form. Providing the wrong information may lead to incorrect amounts of tax being withheld from payments made to you.

- 1 You don't need to complete this form if you:
 - are a beneficiary wanting to provide your tax file number (TFN) to the trustee of a closely held trust. For more information, visit ato.gov.au/trustsandtfnwithholding
 - are receiving superannuation benefits from a super fund and have been taken to have quoted your TFN to the trustee of the super fund
 - want to claim the seniors and pensioners tax offset by reducing the amount withheld from payments made to you. You should complete a withholding declaration form (NAT 3093)
 - want to claim a zone, overseas forces or invalid and invalid carer tax offset by reducing the amount withheld from payments made to you. You should complete a withholding declaration form (NAT 3093).
- For more information about your entitlement, visit ato.gov.au/taxoffsets



Section A: To be completed by the payee

Question 1 What is your tax file number (TFN)?

You should give your TFN to your employer only after you start work for them. Never give your TFN in a job application or over the internet.



We and your payer are authorised by the Taxation Administration Act 1953 to request your TFN. It's not an offence not to quote your TFN. However, quoting your TFN reduces the risk of administrative errors and having extra tax withheld. Your payer is required to withhold the top rate of tax from all payments made to you if you do not provide your TFN or claim an exemption from quoting your TFN.

How do you find your TFN?

You can find your TFN on any of the following:

- your income tax notice of assessment
- correspondence we send you
- a payment summary your payer issues to you.

If you have a tax agent, they may also be able to tell you.

If you still can't find your TFN, you can:

phone us on **13 28 61** between 8.00am and 6.00pm, Monday to Friday.

If you phone or visit us, we need to know we are talking to the correct person before discussing your tax affairs. We will ask you for details only you, or your authorised representative, would know.

You don't have a TFN

If you don't have a TFN and want to provide a TFN to your payer, you will need to apply for one.

For more information about applying for a TFN, visit ato.gov.au/tfn

You may be able to claim an exemption from quoting your TFN.

Print X in the appropriate box if you:

- have lodged a TFN application form or made an enquiry to obtain your TFN. You now have 28 days to provide your TFN to your payer, who must withhold at the standard rate during this time. After 28 days, if you haven't given your TFN to your payer, they will withhold the top rate of tax from future payments
- are claiming an exemption from quoting a TFN because you are under 18 years of age and do not earn enough to pay tax, or you are an applicant or recipient of certain pensions, benefits or allowances from the:
 - Department of Human Services however, you will need to quote your TFN if you receive a Newstart, Youth or sickness allowance, or an Austudy or parenting payment
 - Department of Veterans' Affairs a service pension under the Veterans' Entitlement Act 1986
 - Military Rehabilitation and Compensation Commission.

Providing your TFN to your super fund

Your payer must give your TFN to the super fund they pay your contributions to. If your super fund doesn't have your TFN, you can provide it to them separately. This ensures:

- your super fund can accept all types of contributions to your accounts
- additional tax will not be imposed on contributions as a result of failing to provide your TFN
- vou can trace different super accounts in your name.



For more information about providing your TFN to your super fund, visit ato.gov.au/supereligibility

Question 2-6

Complete with your personal information.

Question 7 On what basis are you paid?

Check with your payer if you're not sure.

Question 8

Are you an Australian resident for tax purposes or a working holiday maker?

Generally, we consider you to be an Australian resident for tax purposes if you:

- have always lived in Australia or you have come to Australia and now live here permanently
- are an overseas student doing a course that takes more than six months to complete
- migrate to Australia and intend to reside here permanently.

If you go overseas temporarily and don't set up a permanent home in another country, you may continue to be treated as an Australian resident for tax purposes.

If you are in Australia on a working holiday visa (subclass 417) or a work and holiday visa (subclass 462) you must place an X in the working holiday maker box. Special rates of tax apply for working holiday makers.



For more information about working holiday makers, visit ato.gov.au/whm

If you're not an Australian resident for tax purposes or a working holiday maker, place an X in the foreign resident box, unless you are in receipt of an Australian Government pension or allowance.

Temporary residents can claim super when leaving Australia, if all requirements are met. For more information, visit ato.gov.au/departaustralia

Foreign resident tax rates are different

A higher rate of tax applies to a foreign resident's taxable income and foreign residents are not entitled to a tax-free threshold nor can they claim tax offsets to reduce withholding, unless you are in receipt of an Australian Government pension or allowance.



To check your Australian residency status for tax purposes or for more information, visit ato.gov.au/residency

2 Tax file number declaration

Question 9 Do you want to claim the tax-free threshold from this payer?

The tax-free threshold is the amount of income you can earn each financial year that is not taxed. By claiming the threshold, you reduce the amount of tax that is withheld from your pay during the year.

Answer **yes** if you want to claim the tax-free threshold, you are an Australian resident for tax purposes, and one of the following applies:

- you are not currently claiming the tax-free threshold from another paver
- you are currently claiming the tax-free threshold from another payer and your total income from all sources will be less than the tax-free threshold.

Answer **yes** if you are a foreign resident in receipt of an Australian Government pension or allowance.

Answer **no** if none of the above applies or you are a working holiday maker.

- If you receive any taxable government payments or allowances, such as Newstart, Youth Allowance or Austudy payment, you are likely to be already claiming the tax-free threshold from that payment.
- For more information about the current tax-free threshold, which payer you should claim it from, or how to vary your withholding rate, visit ato.gov.au/taxfreethreshold

Question 10

Do you have a Higher Education Loan Program (HELP), VET Student Loan (VSL), Financial Supplement (FS), Student Start-up Loan (SSL) or Trade Support Loan (TSL) debt?

Answer yes if you have a HELP, VSL, FS, SSL or TSL debt.

Answer **no** if you do not have a HELP, VSL, FS, SSL or TSL debt, or you have repaid your debt in full.

- You have a HELP debt if either:
 - the Australian Government lent you money under HECS-HELP, FEE-HELP, OS-HELP, VET FEE-HELP, VET Student loans prior to 1 July 2019 or SA-HELP.
 - you have a debt from the previous Higher Education Contribution Scheme (HECS).

You have a SSL debt if you have an ABSTUDY SSL debt.

You have a separate VSL debt that is not part of your HELP debt if you incurred it from 1 July 2019.

For information about repaying your HELP, VSL, FS, SSL or TSL debt, visit ato.gov.au/getloaninfo

Have you repaid your HELP, VSL, FS, SSL or TSL debt?

When you have repaid your HELP, VSL, FS, SSL or TSL debt, you need to complete a *Withholding declaration* (NAT 3093) notifying your payer of the change in your circumstances.

Sign and date the declaration

Make sure you have answered all the questions in section A, then sign and date the declaration. Give your completed declaration to your payer to complete section B.

Section B: To be completed by the payer

- Important information for payers see the reverse side of the form.
- Lodge online Payers can lodge TFN declaration reports online if you have software that complies with our specifications.

For more information about lodging the TFN declaration report online, visit ato.gov.au/lodgetfndeclaration

Tax file number declaration 3

More information

Internet

- For general information about TFNs, tax and super in Australia, including how to deal with us online, visit our website at ato.gov.au
- For information about applying for a TFN on the web, visit our website at ato.gov.au/tfn
- For information about your super, visit our website at ato.gov.au/checkyoursuper

Useful products

In addition to this TFN declaration, you may also need to complete and give your payer the following forms which you can download from our website at **ato.gov.au**:

- Medicare levy variation declaration (NAT 0929), if you qualify for a reduced rate of Medicare levy or are liable for the Medicare levy surcharge. You can vary the amount your payer withholds from your payments.
- Standard choice form (NAT 13080) to choose a super fund for your employer to pay super contributions to. You can find information about your current super accounts and transfer any unnecessary super accounts through myGov after you have linked to the ATO. Temporary residents should visit ato.gov.au/departaustralia for more information about super.

Other forms and publications are also available from our website at ato.gov.au/onlineordering or by phoning 1300 720 092.

Phone

- Payee for more information, phone 13 28 61 between 8.00am and 6.00pm, Monday to Friday. If you want to vary your rate of withholding, phone 1300 360 221 between 8.00am and 6.00pm, Monday to Friday.
- Payer for more information, phone 13 28 66 between 8.00am and 6.00pm, Monday to Friday.

If you phone, we need to know we're talking to the right person before we can discuss your tax affairs. We'll ask for details only you, or someone you've authorised, would know. An authorised contact is someone you've previously told us can act on your behalf.

If you do not speak English well and need help from the ATO, phone the Translating and Interpreting Service on **13 14 50**.

If you are deaf, or have a hearing or speech impairment, phone the ATO through the National Relay Service (NRS) on the numbers listed below:

- TTY users phone **13 36 77** and ask for the ATO number you need (if you are calling from overseas, phone **+61 7 3815 7799**)
- Speak and Listen (speech-to-speech relay) users phone 1300 555 727 and ask for the ATO number you need (if you are calling from overseas, phone +61 7 3815 8000)
- Internet relay users connect to the NRS on relayservice.gov.au and ask for the ATO number you need.

If you would like further information about the National Relay Service, phone 1800 555 660 or email helpdesk@relayservice.com.au

Privacy of information

Taxation law authorises the ATO to collect information and to disclose it to other government agencies. For information about your privacy, go to **ato.gov.au/privacy**

Our commitment to you

We are committed to providing you with accurate, consistent and clear information to help you understand your rights and entitlements and meet your obligations.

If you follow our information in this publication and it turns out to be incorrect, or it is misleading and you make a mistake as a result, we must still apply the law correctly. If that means you owe us money, we must ask you to pay it but we will not charge you a penalty. Also, if you acted reasonably and in good faith we will not charge you interest.

If you make an honest mistake in trying to follow our information in this publication and you owe us money as a result, we will not charge you a penalty. However, we will ask you to pay the money, and we may also charge you interest. If correcting the mistake means we owe you money, we will pay it to you. We will also pay you any interest you are entitled to.

If you feel that this publication does not fully cover your circumstances, or you are unsure how it applies to you, you can seek further assistance from us.

We regularly revise our publications to take account of any changes to the law, so make sure that you have the latest information. If you are unsure, you can check for more recent information on our website at **ato.gov.au** or contact us.

This publication was current at June 2019

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Published by

Australian Taxation Office Canberra June 2019

DE-6078



Tax file number declarationThis declaration is NOT an application for a tax file number.

- Use a black or blue pen and print clearly in BLOCK LETTERS.
- Print X in the appropriate boxes.
 Read all the instructions including

ato.gov.au — nead all the instructions	sincluding the privacy statement before you complete this declaration.
Section A: To be completed by the PAYEE	5 What is your primary e-mail address?
What is your tax file number (TFN)?	
OR I have made a separate application/enquiry to	
information, see	
question 1 on page 2 of the instructions. OR I am claiming an exemption because I am under 18 years of age and do not earn enough to pay tax.	Day Month Year
OR I am claiming an exemption because I am in	6 What is your date of birth?
receipt of a pension, benefit or allowance.	7 On what basis are you paid? (select only one)
What is your name? Title: Mr Mrs Miss Ms	Full-time Part-time Labour Superannuation or annuity employment hire income stream Casual employment
Surname or family name	8 Are you: (select only one)
First given name	An Australian resident for tax purposes A foreign resident for tax purposes OR A working holiday maker
	9 Do you want to claim the tax-free threshold from this payer?
Other given names	Only claim the tax-free threshold from one payer at a time, unless your total income from all sources for the financial year will be less than the tax-free threshold.
	Answer no here if you are a foreign resident or working holiday
What is your home address in Australia?	Yes No Maker, except if you are a foreign resident in receipt of an Australian Government pension or allowance.
	10 Do you have a Higher Education Loan Program (HELP), VET Student Loan (VSL), Financial Supplement (FS), Student Start-up Loan (SSL) or
	Trade Support Loan (TSL) debt?
Suburb/town/locality	Yes Your payer will withhold additional amounts to cover any compulsory repayment that may be raised on your notice of assessment.
State/territory Postcode	DECLARATION by payee: I declare that the information I have given is true and correct.
State/territory Positione	Signature
	Date Day Month Year
If you have changed your name since you last dealt with the ATO, provide your previous family name.	You MUST SIGN here / / /
	There are penalties for deliberately making a false or misleading statement.
Once section A is completed and signed, give it to your payer to com	nlete section B
Section B: To be completed by the PAYER (if you are a What is your Australian business number (ABN) or Branch number	not lodging online) 5 What is your primary e-mail address?
withholding payer number? (if applicable)	
If you don't have an ABN or withholding	
payer number, have you applied for one?	6 Who is your contact person?
What is your legal name or registered business name (or your individual name if not in business)?	
(or your individual name it not in business)?	Business phone number
	Dusiness priorie number
	7 If you no longer make payments to this payee, print X in this box.
	DECLARATION by payer: I declare that the information I have given is true and correct. Signature of payer
What is your business address?	Date Day Month Year
Suburb/town/locality	There are penalties for deliberately making a false or misleading statement.
	Return the completed original ATO copy to:
State/territory Postcode Postcode	Australian Taxation Office See next page for:
	PO Box 9004 PENRITH NSW 2740 ■ payer obligations ■ lodging online.



Payer information

The following information will help you comply with your pay as you go (PAYG) withholding obligations.



Is your employee entitled to work in Australia?

It is a criminal offence to knowingly or recklessly allow someone to work, or to refer someone for work, where that person is from overseas and is either in Australia illegally or is working in breach of their visa conditions.

People or companies convicted of these offences may face fines and/or imprisonment. To avoid penalties, ensure your prospective employee has a valid visa to work in Australia before you employ them. For more information and to check a visa holder's status online, visit the Department of Home Affairs website at homeaffairs.gov.au

Is your payee working under a working holiday visa (subclass 417) or a work and holiday visa (subclass 462)?

Employers of workers under these two types of visa need to register with the ATO, see ato.gov.au/whmreg

For the tax table "working holiday maker" visit our website at ato.gov.au/taxtables

Payer obligations

If you withhold amounts from payments, or are likely to withhold amounts, the payee may give you this form with section A completed. A TFN declaration applies to payments made after the declaration is provided to you. The information provided on this form is used to determine the amount of tax to be withheld from payments based on the PAYG withholding tax tables we publish. If the payee gives you another declaration, it overrides any previous declarations.

Has your payee advised you that they have applied for a TFN, or enquired about their existing TFN?

Where the payee indicates at question 1 on this form that they have applied for an individual TFN, or enquired about their existing TFN, they have 28 days to give you their TFN. You must withhold tax for 28 days at the standard rate according to the PAYG withholding tax tables. After 28 days, if the payee has not given you their TFN, you must then withhold the top rate of tax from future payments, unless we tell you not to.

If your payee has not given you a completed form you must:

- notify us within 14 days of the start of the withholding obligation by completing as much of the payee section of the form as you can. Print 'PAYER' in the payee declaration and lodge the form – see 'Lodging the form'.
- withhold the top rate of tax from any payment to that payee.



For a full list of tax tables, visit our website at ato.gov.au/taxtables

Lodging the form

You need to lodge TFN declarations with us within 14 days after the form is either signed by the payee or completed by you (if not provided by the payee). You need to retain a copy of the form for your records. For information about storage and disposal, see below.

You may lodge the information:

- online lodge your TFN declaration reports using software that complies with our specifications. There is no need to complete section B of each form as the payer information is supplied by your software.
- by paper complete section B and send the original to us within 14 days.



For more information about lodging your TFN declaration report online, visit our website at ato.gov.au/lodgetfndeclaration

Provision of payee's TFN to the payee's super fund

If you make a super contribution for your payee, you need to give your payee's TFN to their super fund on the day of contribution, or if the payee has not yet quoted their TFN, within 14 days of receiving this form from your payee.

Storing and disposing of TFN declarations

The TFN Rule issued under the *Privacy Act 1988* requires a TFN recipient to use secure methods when storing and disposing of TFN information. You may store a paper copy of the signed form or electronic files of scanned forms. Scanned forms must be clear and not altered in any way.

If a payee:

- submits a new *TFN declaration* (NAT 3092), you must retain a copy of the earlier form for the current and following financial year.
- has not received payments from you for 12 months, you must retain a copy of the last completed form for the current and following financial year.



Penalties

You may incur a penalty if you do not:

- lodge TFN declarations with us
- keep a copy of completed TFN declarations for your records
- provide the payee's TFN to their super fund where the payee quoted their TFN to you.



Request for Medicare claims information

Information about your request

The purpose of this form is to request Medicare claims information for individuals and families.

Any changes to this form must be initialled by the relevant signatory.

You can view, download and print your Medicare claims information for at least the last 3 years by accessing your Medicare Online account through myGov.

This form should only be used to request Medicare claims information which is older than 3 years.

If you are requesting Medicare claims information for a person (other than children under 14 years of age) who cannot consent to the release of their own information (e.g. they have a power of attorney or they are deceased), in addition to completing this form, please provide evidence of your authority to act on their behalf.

Information that may be provided in response to your request will include date of service, item claimed, item description, benefit amount, payment method, relevant dates and provider names and locations.

Filling in this form

- · Please use black or blue pen
- Print in BLOCK LETTERS
- Mark boxes like this with a ✓ or X
- Where you see a box like this Go to 5 skip to the question number shown. You do not need to answer the questions in between.

Returning your form

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

If you have indicated that the information requested in this form should be provided to a third party, please return this completed form to that third party.

The third party is responsible for sending this completed form to the email address below.

Email the completed form to:

medicare.disclosure@humanservices.gov.au

or

visit one of our service centres.

For more information

For more information, go to **humanservices.gov.au** or for assistance completing this form call **132 011** Monday to Friday, between 8.30 am and 5.00 pm, Australian Eastern Standard Time.

Note: Call charges may apply.

De	etails of person making request
1	Medicare card number
	Ref no.
	Name
	Dr Mr Mrs Miss Ms Other
	Family name
	First given name
	Second given name
	Date of birth / /
	Permanent address
	Postcode
	Postal address (if different to above)
	Postoodo
	Postcode
	Daytime phone number
	Mobile phone number
	The state of the s
	Email
	@
	As we will send your personal information to the email address that you provide, you should be satisfied that the address is appropriate for the receipt of personal information.
	aims information request
	Indicate the date range(s) for the claims information required.
	Medicare claims history for the period
	From / / to / /
	(insert full date range e.g. 01/05/2014 to 31/05/2015)
	Are you requesting personal or family claims information?
	Personal only Go to 14
	Family only
	Personal and family

Family members aged 14 years and over Dr Mr Mrs Miss Ms Other Are you requesting information about other family members aged 14 years or over? Family name No 60 to 10 Yes First given name Complete question 9 if information is required for other family members aged 14 years and over. Second given name Information requested for family members aged 14 years and over, must be accompanied by their signature. If the other family members are not listed on your Medicare Date of birth card they will need to submit a separate request. Family member 1 Would you like us to send your personal information to a Dr Mr Mrs Miss Ms Other third party? No Family name Yes I authorise the Australian Government Department of Human Services to provide my personal First given name information requested in this form, to the following organisation or person: Contact name Second given name Date of birth Organisation name Would you like us to send your personal information to a third party? No Postal address I authorise the Australian Government Department of Human Services to provide my personal information requested in this form, to the following organisation or person: Contact name Postcode Family member 2 signature Organisation name D Date Postal address If the information relates to more than 2 additional family members aged 14 years and over, attach a separate sheet with details. Postcode Family member 1 signature D Date

Family member 2

Requests for children under 14 years of age

A person with parental responsibility can generally get Medicare or PBS information about a child where the child is under 14 years of age and listed on the same Medicare card as the requesting person. 10 Are you requesting information for a child under 14 years of No 60 to 14 Yes 11 Are you the child's parent or guardian? No You may not request this claims information Yes If legal guardian, attach supporting documents Child 1 Family name First given name Second given name Other names child known by (if applicable) Date of birth Is the child a subject of Family Court orders? Provide a copy of the current court order. Is the child listed on more than one Medicare card? Yes Provide details Child's other Medicare card number Ref no. Child's other address (if applicable) Postcode

C			

Family name
First given name
Second given name
Other names child known by (if applicable)
Date of birth / / Is the child a subject of Family Court orders? No Yes Provide a copy of the current court order. Is the child listed on more than one Medicare card? No
Yes Provide details Child's other Medicare card number Ref no.
Postcode hild 3
Family name First given name
Second given name
Other names child known by (if applicable)
Date of birth s the child a subject of Family Court orders? No Yes Provide a copy of the current court order. s the child listed on more than one Medicare card? No Yes Provide details Child's other Medicare card number Child's other address (if applicable)
Postcode



If the information relates to more than 3 children under 14 years of age, attach a separate sheet with details.

12	Would you like us to send your child's/children's personal information to a third party? No Go to 14 Yes								
13	I authorise the Australian Government Department of Human Services to provide my child's/children's personal information requested in this form, to the following organisation or person:								
	Contact name								
	Organisation name								
	Postal address								
	Postcode								
Au	thorisation								
14	Would you like us to send your personal information to a third party? No Go to 16 Yes								
15	I authorise the Australian Government Department of Human Services to provide my personal information requested in this form, to the following organisation or person: Contact name								
	Contact name								
	Organisation name								
	Claims Management Australasia Pty Ltd								
	Postal address								
	P O Box 6009								
	Dural Delivery Centre								
	NSW Postcode 2158								
Pri	vacy notice								
16	Your personal information is protected by law, including the <i>Privacy Act 1988</i> , 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 for: the purposes of research, or investigation, or where you have agreed, or where it is required or authorised by law.								
	If you have requested claims history which is older than 5 years, your personal information will be disclosed to the Department of Health so that your request can be processed.								
	You can get more information about the way in which the Department of Human Services will manage your personal information, including our privacy policy, at								

humanservices.gov.au/privacy or by requesting a copy from

Declaration

17 I declare that:

- I have parental responsibility for each child under 14 years of age for whom I have requested claims information.
- the information I have provided in this form is complete and correct.

I understand that:

giving false or misleading information is a serious offence.

Applicant's signature

Date

the department.