



Application for a Medicare Entitlement Statement

For the purpose of this form, the applicant is the person who is **applying** for the Medicare Entitlement Statement.

When to use this form

The *Income Tax Assessment Act 1936* makes the Medicare levy payable by individuals residing in Australia who are eligible for Medicare. Persons who are **not eligible** for Medicare can apply for an exemption from the Medicare levy in their income tax return.

To apply for an exemption from the Medicare levy, the Australian Taxation Office requires a person to acknowledge that they have been issued with a Medicare Entitlement Statement when completing their income tax return.

Even if a person is not eligible for Medicare, they may still not be eligible for an exemption if they maintain a dependant that is eligible for Medicare. The Australian Taxation Office makes the determination on whether a person is eligible for an exemption.

Persons not eligible for Medicare

Before applying for a Medicare Entitlement Statement, the applicant will need to determine that they were not eligible for Medicare for all or part of the given financial year.

A person may not be eligible for Medicare if, at any point during that given financial year, they:

- were a permanent resident of Australia who
 - had been living outside Australia for 12 months, or more, **and**
 - had not come back to live in Australia permanently
- held a temporary visa and had not applied for permanent residency
- were an Australian citizen who had been living overseas for 5 years or more
- were a New Zealand citizen who spent less than 6 months in Australia within a 12 month period
- were not eligible under a Reciprocal Health Care Agreement. Countries include: Belgium, Finland, Italy, Malta, the Netherlands, Norway, Slovenia, Sweden and the United Kingdom (including Northern Ireland).

To determine Medicare eligibility, visit the Department of Human Services website humanservices.gov.au/medicareentitlement

How to apply

- A separate application form is required for each financial year. (A financial year runs from 1 July to 30 June.)
- When the application has been assessed and processed we will advise of the outcome. If the application is approved we will issue a Medicare Entitlement Statement, which will certify that the applicant was not eligible for Medicare benefits for a specified period. We will also advise if we do not approve the application or require more information.

- A person should only apply for a Medicare Entitlement Statement for a **previous** financial year. A person should not apply for a Medicare Entitlement Statement for the current financial year unless they are leaving Australia and will be submitting a final income tax return before the end of the financial year.
- If a tax agent prepares the application, the tax agent must complete the tax agent details in this application form.

Documents required

The following documents **must** be submitted when lodging this form:

Failing to do so will result in a delay in the assessment of the application.

- a certified copy of the photo page of the applicant's passport.
- visa evidence for the given financial year - endorsed in passport/email or letter from the Department of Home Affairs.

Documents that **may be** required depending on the applicant's circumstances:

- certified copy of the applicant's current or expired European Health Insurance card or other evidence of health insurance.
- letter/email from the Department of Home Affairs confirming an application for permanent residency has been lodged, approved, refused or withdrawn.
- letter/email from the Migration Review Tribunal confirming an appeal has been lodged against a refused decision.

Certified documents

What is a certified document?

A certified copy is a copy of an original document that has been verified as being a true copy after the original document has been sighted by an authorised person.

Who can certify documents?

A number of people can certify documents. Examples include:

- legal practitioners
- medical practitioners
- pharmacists
- police officers
- justice of the peace.

For a complete list of people who can certify documents, go to ag.gov.au/Publications/Statutory-declarations/Pages/List-of-authorised-witnesses.aspx

For more information

For more information about the Medicare Entitlement Statement, go to humanservices.gov.au/medicareentitlement



Application for a Medicare Entitlement Statement

Filling in this form

- Please use black or blue pen
- Print in BLOCK LETTERS
- 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.
- For instructions on how to complete this form on screen, see 'Instruction' button on page 1.

1 Is a tax agent completing this application on the applicant's behalf?

- No **Go to 5**
Yes

2 Does the applicant give permission for their tax agent to supply and receive information related to this application?

- No
Yes

Tax agent's details

When sending documents by email, documents:

- **must** be in PDF format, **and**
- **must not** be password protected.

If you are sending applications for multiple applicants, a separate email **must** be sent for each applicant. If the applicant has multiple applications for different financial years, they can be sent in one email.

Questions 3 and 4 **must** be completed by the tax agent.

3 Name of company

Name of tax agent who is completing this application

Tax agent's daytime phone number

4 Have you read and understood the Privacy notice contained in this form?

- No
Yes

Applicant's details

The applicant is the person who is **applying** for the Medicare Entitlement Statement.

5 Does the applicant have a current or expired Medicare card?

- No
Yes Provide the applicant's Medicare card number and reference number

Applicant's Medicare card number

Ref no.

6 Provide the applicant's name as it appears on their passport

Dr Mr Mrs Miss Ms Other

Family name

First given name

Second given name

7 Applicant's gender

- Male
Female

8 Applicant's date of birth

9 Applicant's daytime phone number

Applicant's email

10 Applicant's residential address in Australia

Postcode

11 This question **must** be completed if one of the following applies:

- applicant has left Australia permanently, **or**
- applicant is in Australia but their postal address is different to their residential address, **or**
- a tax agent is completing this application.

What postal address would the applicant like all correspondence sent to?

Postcode

Country (if not Australia)

Correspondence related to this application will be forwarded to this address.

12 Is the postal address provided in question 11 a tax agent's address?

- No
Yes

Eligibility for Medicare

13 What was the applicant's country of residence for **6 months or more** before arriving in Australia?


14 How long was the applicant residing in that country?
(State total number of years and/or months in numerals e.g. 10)

Years and/or months

15 Does the applicant hold **current or expired** health or medical insurance in Belgium, Italy, the Netherlands, Norway or Slovenia (e.g. European Health Insurance card, Tessera Sanitaria or A.I.R.E registration)?

No

Yes

 Attach certified copies of the medical insurance documentation with this application.

16 Is the applicant from Finland, Malta or Norway?

No

Yes Did the applicant enter Australia on a student visa?
No Yes


17 Has the applicant lodged an application for permanent residency (other than a parent visa) with the Department of Home Affairs, this includes applications for Spouse Combined visas (subclass 820/801) and (subclass 309/100)?

No **Go to 18**

Yes Give details below

Application 1

A Date application lodged

 Attach evidence (letter/email) from the Department of Home Affairs confirming the lodgment date.

B Is the application for permanent residency that is being considered by the Department of Home Affairs, still ongoing?

No

Yes **Go to 18**


C Indicate if the application for permanent residency was:

Tick ONE only

Approved Date **Go to 19**


Withdrawn Date **Go to 19**

Refused Date **Go to D**

 Attach evidence (letter/email) from the Department of Home Affairs confirming the permanent residency application was approved, withdrawn or refused.


D Has the applicant lodged an appeal against that decision?

No

Yes  Attach evidence that the applicant has lodged an appeal.

Application 2 (if the applicant has lodged more than one Permanent residency application)

A Date application lodged

 Attach evidence (letter/email) from the Department of Home Affairs confirming the lodgment date.

B Is the application for permanent residency, that is being considered by the Department of Home Affairs, still ongoing?

No

Yes **Go to 18**


C Indicate if the application for permanent residency was:

Tick ONE only

Approved Date **Go to 19**

Withdrawn Date **Go to 19**


Refused Date **Go to D**

 Attach evidence (letter/email) from the Department of Home Affairs confirming the permanent residency application was approved, withdrawn or refused.

D Has the applicant lodged an appeal against that decision?

No

Yes  Attach evidence that the applicant has lodged an appeal.

 If the applicant has lodged more than two applications for permanent residency, attach a separate sheet with details.

18 Has the applicant lodged an application for permanent residency with the Department of Home Affairs under parent category (Aged parent or Contributory parent)?

No

Yes Aged parent **OR** Contributory parent

Date application lodged

Claiming period

- 19**
- A separate application must be completed for each financial year.
 - We are **unable** to certify any period after the date this application is signed.
 - All periods **must** be in the same financial year.

Which financial year is the applicant applying for?

1 July 20 ____ to 30 June 20 ____

 Attach evidence of visa - endorsed in passport/email or letter from the Department of Home Affairs.

20 Is the applicant leaving Australia permanently before the end of the current financial year?

No

Yes Expected departure date

Checklist

21 Before submitting an application make sure that:

A separate application is lodged for each financial year (if applicable)

All questions in the form have been completed

The application form has been signed and dated

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

A certified copy of the photo page of the applicant's passport

Visa evidence - endorsed in passport/email or letter from the Department of Home Affairs

A certified copy of evidence of a **current or expired** Health Insurance card/medical insurance card or letter showing expiry date (if you answered **Yes** at **question 15**)

A letter/email from the Department of Home Affairs confirming application for permanent residency lodgment date(s) (if you answered **Yes** at **question 17A**)

A copy of a letter/email from the Department of Home Affairs confirming the application for permanent residency has been either approved, withdrawn or refused (if you answered **No** at **question 17B**)

A copy of a letter/email from the Migration Review Tribunal confirming an appeal has been lodged (if you answered **Yes** at **question 17D**)

Obligations

22 Privacy notice

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 humanservices.gov.au/privacy

23 Declaration

I declare that:

- I have attached all relevant documents.
- the information I have provided in this form is complete and correct.
- for the period(s) specified in question 19, I was a resident of Australia for taxation purposes, and at the same time I was **not eligible** for Medicare benefits, nor Medicare benefits under a Reciprocal Health Care Agreement.

I understand that:

- giving false or misleading information is a serious offence.
- information regarding this application is exchanged between the Australian Government Department of Human Services and the Australian Taxation Office.
- the Australian Government Department of Human Services may contact the Department of Home Affairs to obtain information relating to my immigration status (if required).

Applicant's signature



Date

/ /

Returning your form

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

Scan and email your completed application form and other documents as a PDF to MES@humanservices.gov.au

All documents sent by email:

- **must** be in PDF format, **and**
- **must not** be password protected.

If you are sending applications for multiple applicants, a separate email **must** be sent for each applicant. If the applicant has multiple applications for different financial years, they can be sent in one email.

Please be aware that there may be risks with sending personal information through unsecured networks and email channels.

or

Post to:

**Department of Human Services
Medicare Entitlement Statement Unit
GPO Box 9822
ADELAIDE SA 5001**