

Council's Voluntary Pensioner Rebate Policy

Contents

- Scope
 - Purpose
 - Policy
 - Criteria / Qualification
 - Procedure
-

Scope

This policy applies to any ratepayer who qualifies for the mandatory pensioner rebate under section 575 of Local Government Act 1993 and who has owned and continuously resided in Parramatta Local Government District for 5 successive financial years.

Purpose

To provide an additional rate rebate to qualifying ratepayers in the Parramatta LGA

Policy

The policy on the Voluntary Council Rate Rebate applicable under Section 582 of the Local Government Act, 1993 is as follows:

Criteria for Rebate:

- 1 Only ratepayers living within the local government area are granted rebates.
- 2 To qualify for the voluntary rebate a pensioner must have owned and continuously resided on a property in the Parramatta City Council area for at least five (5) successive financial years prior to claiming the rebate.
- 3 If a person becomes entitled to the proportionate mandatory pensioner rate rebate under Section 575, then the voluntary council pensioner rate rebate will apply at the same pro-rata percentage as the mandatory pensioner rate rebate.
- 4 Regardless of how many lots of land and cottages the rate payer owns, the council pensioner rebate will only apply to the property occupied by the ratepayer.
- 5 Where a pensioner dies or sells a property, a rebate will not be granted for the remaining full quarters of the current financial year, from the date of death or settlement date, unless the property is jointly owned with another eligible pensioner.

Voluntary Council Pensioner Rebate		
Owner: Financial Operations	Area: Finance	Version 2
Adopted by Council 27 July 2009	Minute Number 10855	

- 6 Where an applicant has sold part of the property and makes a claim in respect of the part of the property retained, a separate valuation is required before an allowance can be made.
- 7 Where an applicant is not shown in the Council's records as the owner of the property, and it is appearing in the name of a Deceased Estate, an allowance is made to the applicant, subject to submission of a Statutory Declaration that the applicant is the person who would pay the rates. (The applicant does not have to be related to the deceased).
- 8 Where an applicant is not shown in the Council's records as the owner of the property, but has been granted life tenancy, an allowance is made to the applicant upon receipt of documentation proving life tenancy, and subject to submission of a Statutory Declaration that the applicant is the person who would pay the rates. (This is based on who is on the will).

WHO IS ENTITLED TO A REBATE UNDER SECTION 575

The Local Government (General) Regulation 2005 defines "eligible pensioners" as follows:

- a) Persons who receive a pension, benefit or allowance under Chapter 2 of the Social Security Act 1991 of the Commonwealth, or a service pension under Part III of the Veterans' Entitlements Act 1986 of the Commonwealth, and who are entitled to a pensioner concession card issued by or on behalf of the commonwealth government: or
- b) Persons who receive a pension from the Commonwealth Department of Veterans' Affairs and are the holders of a pension concession card issued by Centrelink.

Voluntary Council Pensioner Rebate		
Owner: Financial Operations	Area: Finance	Version 2
Adopted by Council 27 July 2009	Minute Number 10855	

Rebate Processing Procedure:

Rebate application:

- ❖ Customer calls enquiring about rebate for rates
- ❖ Confirm ownership on the rates account, if they are the owner or part owner
- ❖ They have to come into council to fill out Pension Concession form, voluntary rebate form and statutory declaration if applicable and bring original Pension Concession card for us to view and photocopy of both sides.
- ❖ If they are unable to come into council, reason eg: house bound or advanced age, vision impaired, etc. A pension concession form, voluntary rebate form and statutory declaration will be sent out with letter informing the pensioner on how to complete the forms, attaching photocopy of both sides of pension concession card to be sent in for processing.
- ❖ Once form/s and photocopy of both sides of pension concession card is received, form is checked to make sure that all details have been filled out and signed in corresponding areas.
- ❖ If information is missing we contact the applicant to confirm details. If form/s missing, or not signed, we contact applicant by phone to request them to come and complete application.
- ❖ If they are unable to come in to Council, we resend the form out to them for completion.
- ❖ Once we receive the form and all details required are completed, we process an online Centrelink applicant confirmation for CLINK (Centrelink) or DVA (Veterans affairs)
- ❖ If all details do not validate, we send letter out to the applicant informing them that their application has been declined (see letter A attached)
- ❖ If details validate, we process the application and grant the discount on their rates account.
- ❖ Check on system for Notice of Sale transfer to see if applicant is eligible for Voluntary rebate. (form should be filled out at same time as pension concession form)

Voluntary Council Pensioner Rebate		
Owner: Financial Operations	Area: Finance	Version 2
Adopted by Council 27 July 2009	Minute Number 10855	

Rebate Scenarios:

- If the applicant is the owner, not living in the property they are not eligible for rebate and letter above (A) should have been sent.
- If the applicant is the sole owner, living in the property less than 5 full financial years they are eligible only for full rebate (pro-rata as per card start date, maximum \$250.00).
- If the applicant is the sole owner, living in the property for 5 full financial years or more they are eligible for mandatory and voluntary rebate (pro-rata as per card start date, maximum \$250.00 + \$100.00 = \$350.00).
- If the applicant is not the owner, living in the property as sole life tenant and responsible for paying rates for less than 5 full financial years they are eligible only for mandatory rebate (pro-rata as per card start date, maximum \$250.00).
- If the applicant is not the owner, living in the property as sole life tenant and responsible for paying rates for 5 full financial years or more they are eligible for mandatory and voluntary rebate (pro-rata as per card start date, maximum \$250.00 + \$100.00 = \$350.00).
- If the applicant is a part owner with someone that is not a spouse and not a pensioner, living in the property less than 5 full financial years they are eligible only for 50% of the mandatory rebate (pro-rata as per card start date, maximum \$250.00).
- If the applicant is a part owner with someone that is not a spouse and not a pensioner, living in the property for 5 full financial years or more, they are eligible only for 50% of the mandatory rebate and half voluntary (pro-rata as per card start date, maximum \$250.00 + \$100.00 = \$350.00).
- If the applicant is a part owner with someone that is not a spouse but is a pensioner, living in the property less than 5 full financial years they are eligible for mandatory rebate (pro-rata as per card start date, maximum \$250.00), both owners will have to fill in forms
- If the applicant is a part owner with someone that is not a spouse but is pensioner, living in the property for 5 full financial years or more, they are eligible for mandatory rebate and full voluntary (pro-rata as per card start date, maximum \$250.00 + \$100.00 = \$350.00), both owners will have to fill in forms
- If the applicant is a part owner with more that one person and they are not pensioners, living in the property less than 5 full financial years they are eligible only for a proportionate amount of the mandatory rebate (pro-rata as per percentage of ownership and card start date, maximum \$250.00).
- If the applicant is a part owner with more that one person that are not pensioners, living in the property for 5 full financial years or more, they are eligible only for a proportionate amount of the mandatory rebate and voluntary (pro-rata as per percentage of ownership and card start date, maximum \$250.00 + \$100.00 = \$350.00).

Voluntary Council Pensioner Rebate		
Owner: Financial Operations	Area: Finance	Version 2
Adopted by Council 27 July 2009	Minute Number 10855	

- If the applicant is a part owner with more than one person and they are pensioners, living in the property less than 5 full financial years they are eligible for mandatory rebate (pro-rata as per card start date, maximum \$250.00), both owners will have to fill in forms
- If the applicant is a part owner with more than one person that are not pensioners, living in the property for 5 full financial years or more, they are eligible for mandatory rebate and full voluntary (pro-rata as per card start date, maximum \$250.00 + \$100.00 = \$350.00), both owners will have to fill in forms

Voluntary Council Pensioner Rebate		
Owner: Financial Operations	Area: Finance	Version 2
Adopted by Council 27 July 2009	Minute Number 10855	