



Voluntary Pensioner Rebate Policy

Contents

1. Scope
 2. Purpose
 3. Policy
 4. Relationship to Legislation and Associated Documents
-

1. Scope

This policy applies to all ratepayers that qualifies for the mandatory pensioner rebate under section 575 of Local Government Act 1993 and who have owned and continuously resided in City of Parramatta Local Government District for 5 successive financial years.

Qualifying ratepayers, in all cases, is deemed to include residents whose property is now included within the City of Parramatta LGA as a result of boundary changes.

2. Purpose

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

3. Policy

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

- 3.1 Only ratepayers living within the local government area are granted rebates.
- 3.2 To qualify for the voluntary rebate a pensioner must have owned and continuously resided on a property in the City of Parramatta Council area for at least five (5) successive financial years prior to claiming the rebate.
- 3.3 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.

| Name of Policy | | |
|-------------------------------|-----------------------------|------------------------------|
| Owner: Rates | Area: Finance | POL No: 215 |
| Date of Commencement: 1995 | Approval Authority: Council | Date Approved: 10 July 2017 |
| Amendment 2 | Date of Next Review:2019 | Review period: every 2 years |



CITY OF PARRAMATTA

- 3.4 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.
- 3.5 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.
- 3.6 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.
- 3.7 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 be responsible for paying the rates on that property. Note: It is not a requirement that the applicant be related to the deceased.
- 3.8 Where an applicant is not shown in Council's records as the property owner, but has been granted life tenancy, an allowance will be made to the applicant upon receipt of documentation proving life tenancy and submission of a Statutory Declaration stating that the applicant is the person responsible for paying the rates. Note: ehas been identified as the life tenant on the property owners will.
- 3.9 The procedures to followed to assess each Voluntary Pensioner Rebate claim will be determined by the Rates Manager.

4. Relevance to Legislation and Associated documents

Local Government Act 1993
Policy 327: Rates Hardship Policy

Entitlement 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.

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| REFERENCES | Nil |
| POLICIES | Nil |
| ATTACHMENTS | Voluntary Rebate Processing Checklist |

ATTACHMENT 1

Voluntary Rebate Processing Checklist

Rebate application:

- ❖ Customer enquiry received about a pensioner rates rebate
- ❖ Confirm ownership per Council rates account - are they the owner or part owner
- ❖ Customer to attend Council office to fill out a Pension Concession form, voluntary rebate form and statutory declaration if applicable and provide original Pension Concession card for Council to view and take a copy of both sides of the card.
- ❖ If customer is unable to attend council, e.g. house bound or advanced age, vision impaired, 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 including attaching a 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.
- ❖ Once all forms are received and all details are completed, an online Centrelink applicant confirmation will be sort on CLINK (Centrelink) or DVA (Veterans affairs)
- ❖ If details are validated the application is approved and the discount is applied to the rate account.

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