

Medicare levy exemption certification application and supporting information

Purpose of 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 entitled to Medicare can seek an exemption from the Medicare levy in their income tax return. To obtain an exemption, you must not be eligible for Medicare and must apply for *Medicare levy exemption certification*.

To claim an exemption from the Medicare levy in your income tax return, you may be required to supply a copy of your Medicare levy exemption certification to the Australian Taxation Office (ATO) if requested.

Eligibility

You may be eligible for Medicare levy exemption if you:

- **do not** hold an Australian permanent resident visa and **have not** applied for a permanent resident visa.
- **did not** reside in one of the following countries prior to entering Australia – the United Kingdom, Northern Ireland, Italy, Malta, Sweden the Netherlands, Finland, Norway, Belgium or Slovenia. These countries have a Reciprocal Health Care Agreement with Australia.
- **are an Australian citizen** residing overseas for 5 years or more (this excludes diplomats, defence force personnel or an employee of the Australian government).
- **are a New Zealand citizen** that has been residing in Australia for less than 6 months.

To claim an exemption

- We require a separate application form for each financial year. (A financial year runs from 1 July to 30 June.)
- When we have assessed and processed your application, we will send you the certificate, or a response which details the reason your certification was refused.
- You should not apply for certification for the current financial year unless you 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 under question 19 of the application form.

Documents required

The following documents must be submitted when lodging an application for Medicare levy exemption certification.

Failing to do so will result in your application being returned and consequently delay the assessment of your application.

- Completed **Medicare levy exemption certification application form (3169)**
- Certified copy of the photo page of your passport
- Evidence of visa(s) to cover the period you are claiming

Where your visa has been issued electronically and is not endorsed in your passport, please provide a copy of the letter or email issued to you by the Department of Immigration and Citizenship (DIAC). Visa evidence sent to you from DIAC via email does not need to be certified.

- All Australian arrival stamps

In some cases we may request that you provide Australian departure stamps.

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/Pages/Statutorydeclarationsignatorylist.aspx

For more information

For more information or for additional copies of this form go to our website humanservices.gov.au or email

levyenquiry@humanservices.gov.au or call the Medicare Levy Exemption Certification Unit on **1300 300 271** Monday to Friday, between 8.30 am and 5.00 pm, Australian Eastern Standard Time.

Note: Call charges apply – calls from mobile phones may be charged at a higher rate.

Queries relating to the following should be directed to the ATO.

- Deductions of the Medicare levy from salary or wages
- Medicare levy surcharge.

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(s) and supporting document(s)

Check that you have answered all the questions you need to answer and that you have signed and dated this form.

Send the completed application(s) and certified document(s) to:

Levy Exemption Certification Unit
Department of Human Services
GPO Box 9822
HOBART TAS 7001

Medicare levy exemption certification application

Your details

1 Do you have a Medicare card?

No

Yes If known provide your Medicare card number

- - Ref no.

2 Show your name as it appears on your passport

Dr Mr Mrs Miss Ms Other

Family name

First given name

Other given name(s)

3 Your sex

Male

Female

4 Date of birth

/ /

5 Daytime phone number

()

Email

@

6 Your residential address in Australia

Note: This **cannot** be a PO box address. A business address is not acceptable unless you are living at the business address.

Postcode

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

- you have left Australia permanently, or
- you are in Australia and your postal address is different to your residential address, or
- a Tax agent is completing this application.

What is your postal address?

Postcode

Country (if not Australia)

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

8 Is the postal address provided in question 7 your tax agent's address?

No

Yes

Eligibility for exemption

9 What was your country of residence prior to Australia?

10 How long were you residing in that country (please state in total number of months and/or years)

Years and/or months

11 Have you lodged a permanent resident visa application (other than a parent visa) with the Department of Immigration and Citizenship (DIAC)?

No **Go to 15**

Yes Date application lodged

/ /

12 Is your application for permanent residency that is being considered by DIAC still current (ongoing)?

No

Yes **Go to 16**

13 Indicate if your application for permanent residency was:

Tick ONE only

Approved Date / / **Go to 16**

Withdrawn Date / / **Go to 16**

Refused Date / / **Go to 14**

14 If your application was refused by DIAC, have you lodged an appeal against that decision?

No

Yes

15 Have you lodged an application for permanent residency with DIAC under parent category (Aged parent or Contributory parent)?

No

Yes Date application lodged

Claiming period

- 16**
- You must complete a separate application for each financial year you are applying for.
 - 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 are you applying for?

1 July 20 to 30 June 20

17 Which period during the financial year were you not entitled to Medicare benefits?

Whole financial year (as stated in 16)

or

From to

18 Are you leaving Australia permanently before the end of the current financial year?

No

Yes Expected departure date

Tax agent details

19 Was this application prepared by a tax agent?

No **Go to 20**

Yes Give details

Name of tax agent

Tax agent number

Name of person who prepared this application

Phone number

I give permission for the person stated above to receive information related to this application.


Visa verification authorisation

20 Do you give permission for the Medicare Levy Exemption Unit to contact the Department of Immigration and Citizenship to verify your current visa entitlement for the purpose of determining your entitlement to the Medicare Levy Exemption?

No

Yes

Checklist

21  Attach the following documents with your application.

Certified copies of the following:

- Photo page of your passport
- Evidence of visa(s) covering the period being claimed
- All Australian arrival stamps
- Separate application forms for each financial year (if applicable)

Note:

- Where your visa has been issued electronically and is not endorsed in your passport, please provide a copy of the letter or email issued to you by the Department of Immigration and Citizenship (DIAC). Visa evidence sent to you from DIAC via email does not need to be certified.
- In some cases we may request that you provide Australian departure stamps.

Declaration

22 I declare that:

- the information I have provided in this form is complete and correct
- for the period(s) specified in questions 16 and 17, I was a resident of Australia for taxation purposes, and at the same time I was not entitled to Medicare benefits, nor Medicare benefits under a Reciprocal Health Care Agreement.

I understand that:

- giving false or misleading information is a serious offence.

Signature

Date

Privacy notice

Centrelink, Medicare, Child Support and CRS Australia are services within the Australian Government Department of Human Services (Human Services).

Your personal information is protected by law, including the *Privacy Act 1988*. Your information is collected for Social Security, Family Assistance, Medicare, Child Support and CRS purposes. This information may be required by the powers provided within each services' legislation or voluntarily given by you when you apply for services or payments.

Your information will be used for the assessment and administration of payments and services. Your information may also be used within Human Services, where you have provided consent or it is required or authorised by law. Human Services may disclose your information to Commonwealth Departments, other persons, bodies or agencies **ONLY** where you have provided consent or it is required or authorised by law.

You can get more information about privacy by going to our website **humanservices.gov.au/privacy** or requesting a copy of the full privacy policy at any of our Service Centres.