

Feature

Meet our invalidity
assessment unit

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Meet our invalidity assessment unit

The APS defined benefits schemes invalidity assessment unit is a small unit within our administrator, ComSuper. The team consists of a manager and seven case managers and more than 40 years combined experience. The team is responsible for administering the invalidity sections of the CSS and PSS super legislation.

The team conducts investigations to see if a member is eligible for an invalidity retirement as well as processing pre-assessment payments and partial invalidity pensions. They also look at the health status of new members, the entitlement to Additional Death and Invalidity Cover and the level of benefits payable to retiring and deceased members.

We aim to provide you with invalidity information and forms which are clear and simple and the invalidity assessment unit is designing training sessions about invalidity matters.

The team relies on the good work of agency personnel to make processes run smoothly and invests time into building good working relationships with agency case managers and payroll personnel.

Your feedback about our work at invalidity will help us

We value your opinions and will use your information to develop faster and more effective responses to your needs. Please email your suggestions and comments about our performance and services to invalidity.assessment@css.gov.au or invalidity.assessment@pss.gov.au

PSSap

PSS

CSS

New tax arrangements for terminally ill members

The Australian Tax Office (ATO) has introduced new tax arrangements for terminally ill members. The arrangements will allow the ATO to vary the rate of withholding tax for some terminally ill members who receive a lump sum.

PSSap, PSS and CSS

PSSap, PSS and CSS members who are leaving their employment because they are terminally ill may be eligible for this tax concession. In order to be considered for the concession, members should include medical documents which show they meet the ATO definition of being terminally ill when forwarding their application for superannuation benefits. The ATO definition is:

‘A payee will be taken to be terminally ill if it is certified by two medical practitioners (at least one of these a specialist) that they are suffering from an illness which in the normal course would result in death within a period of 12 months.’

We will determine whether the member meets the ATO definition, and if so, will ensure that there is no tax deducted from any lump sum entitlement.

PSS only

This ATO arrangement does not alter the PSS provisions for members who have a terminal medical condition to be eligible to choose the terminal lump sum option on the issue of an invalidity retirement certificate. The PSS definition of a terminal medical condition is:

‘A condition(s) suffered by an affected person that has been certified by two or more medical practitioners, at least one of whom is not treating the affected person, who have experience in the condition(s), as being of either a terminal nature or of such severity that within two years of the date of their certificate the affected person would need assistance with personal or nursing care on a daily basis.’

The difference between the ATO and PSS definitions of being terminally ill means that terminally ill PSS members may be entitled to choose the option of a terminal lump sum payment, but may not be eligible for the ATO terminally ill tax free lump sum.

For more information email invalidity.assessment@pss.gov.au; invalidity.assessment@css.gov.au or members@pssap.gov.au Or phone 1300 725 171 (PSSap), 1300 000 377 (PSS) or 1300 000 277 (CSS).

Invalidity case presentation for PSS and CSS

Here are some tips for case managers preparing applications for invalidity retirement. We will process your submissions faster if you present your cases in the following way:

- > Include a departmental letter outlining the circumstances of the case.
- > Present the completed Application for issue of invalidity retirement certificate (SPC) form as the first document in the submission. This form, and others required for an invalidity application (for example, Medical examination report for invalidity retirement form {SM2}), can be found under **Forms** at www.css.gov.au or www.pss.gov.au
- > Present the evidence in chronological order from earliest to latest, not file order, and not grouped in divisions such as specialists' reports, rehab report etc.
- > Present all documents printed in legible black print on white background, single-sided, loose-leafed, held together by a bulldog clip – not stapled or bound in any other way.

- > Do not organise the evidence by numbers and do not use tabs unless you are drawing the case manager's attention to a particular document referred to in your covering letter.
- > Send the documents to APS DBS Invalidity Assessment Unit, or to the case manager by name. This will make sure that the submission is delivered directly to the correct area.

The documents needed for an invalidity retirement are listed in the Invalidity notes, on the CSS and PSS websites under Employers/Learning centre. This area also has help sheets to give to doctors who are providing reports, questions to ask assessing medical practitioners and guidance for correctly completing all required forms. You will also find the contact details for our four new medical practitioners to consult for retirement assessment.

Pre-assessment payment (PAP) and PSS Partial invalidity pension (PIP) calculators

Having problems calculating PAP and PSS PIP payments or reimbursements?

There are calculators available at www.css.gov.au and www.pss.gov.au at [Employers/Toolkit/Calculators](#).

We encourage you to use these calculators when seeking reimbursement of PAPs and PSS PIPs. Please send us a copy of your calculation and make sure you provide a covering letter with your contact details.

For more information call **1300 000 377** for PSS and **1300 000 277** for CSS and ask to speak to the APS DBS Invalidation Assessment Unit. Alternatively email invalidity.assessment@pss.gov.au or invalidity.assessment@css.gov.au.

Frequently Asked Questions

Q: Is there a new reporting requirement to report Ordinary Time Earnings (OTE) for PSS and CSS members?

A: Yes, from 1 July 2008 employers are required to provide OTE amounts for all CSS and PSS members.

Q: Does this mean we no longer have a requirement to perform birthday reviews for these members on their anniversaries?

A: No, the legislation for both schemes has not changed. You are still required to apply scheme rules to birthday reviews.

Q: Do we have to produce a quarterly shortfall report for our PSS and CSS members?

A: No, we are collecting OTE amounts for the calculation of potential shortfalls for PSS and CSS members.

We will determine payment shortfalls when a member claims a super entitlement.

Q: Is the quarterly shortfall still required for PSSap members?

A: Yes - this reporting requirement has not changed.

Q: I have heard that from 1 July 2008 everybody is on OTE for super purposes. Does this mean that PSSap members no longer have to be reported on fortnightly contribution salary (FCS)?

A: No, if your agency has not specified in a certified agreement or individual agreement that a PSSap member's salary for super is based on OTE then the employer is required to pay contributions based on the FCS rules.

Coming up

Reminder – Annual Member Statement process

The PSSap annual statements are scheduled for distribution from late September with the PSS and CSS statements scheduled for distribution in late October and November.

If we don't have a home address to send member statements for PSSap members, we will send the statement to their work address.

Unlike PSS and CSS statements, these statements will not be bundled together with distribution instructions. To ensure confidentiality, please ensure that any ARIA correspondence arriving at your mail room is not opened and is passed onto the addressee immediately.

You can update member addresses via the Payroll Interface File and through the Employer Services online grid for manual reporters. Members can update their addresses by using **Your account** (PSSap members) or **Member Services Online** (PSS and CSS members) or by calling PSSap **1300 725 171**, PSS **1300 000 377** or CSS **1300 000 227**.

At Work for You public workshop dates for September and October

To help your employees understand their scheme we can visit your workplace to conduct a member workshop.

We have limited time available for in-house workshops for the rest of the year – call us on 02 6263 6999 or email atworkforemployers@aria.gov.au

If you don't have training facilities at your workplace, you can tell your employees about our upcoming public workshops.

Registration is via the scheme website.

City	Location	Date and time	Scheme
Brisbane	Hilton	18 September at 9.30am	CSS
Brisbane	Hilton	18 September at 2.00pm	PSS
Melbourne	Mantra on Russell	15 October at 9.30am	CSS
Melbourne	Mantra on Russell	15 October at 2.00pm	PSS
Canberra	Rydges Lakeside	22 October at 9.30am	CSS
Hobart	Hotel Grand Chancellor	28 October at 9.00am	CSS
Hobart	Hotel Grand Chancellor	28 October at 11.30am	PSS
Launceston	Hotel Grand Chancellor	30 October at 9.00am	CSS
Launceston	Hotel Grand Chancellor	30 October at 11.30am	PSS
Adelaide	Holiday Inn	12 November at 9.30am	CSS
Adelaide	Holiday Inn	12 November at 2.00pm	PSS
Sydney	Medina Executive	19 November at 9.30am	CSS
Sydney	Medina Executive	19 November at 2.00pm	PSS
Perth	Crowne Plaza	26 November at 9.30am	CSS
Perth	Crowne Plaza	26 November at 2.00pm	PSS

ESO Update

The following ESO message has been switched from a warning to an error.

0608 This member is inactive. Please make sure you are using the correct number.

This message is generated when contributions are paid to an inactive membership which may be preserved, paid out or voided (where incorrectly commenced). To resolve this error you may need to issue a new membership number to your employee. If in doubt, you should contact a Technical Support Officer via the Employer Help Desk'

Contact details



Employer Help Desk

Email employer.help@comsuper.gov.au
Phone 02 6272 9993
Fax 02 6272 9816
Web www.aria.gov.au
(select Employer Centre)

At Work for You

Email atworkforemployers@aria.gov.au
Phone 02 6263 6999