

# School Card scheme procedure for non-government schools

## Overview

This procedure informs non-government schools of the following information in relation to School Card:

- eligibility criteria
- the application process
- their school's responsibility in the application process
- what to do with transfer students
- how to determine the application status
- the reassessment process
- last date for applications to be accepted.

## Scope

This procedure applies to all non-government schools.



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# Detail

To assist non-government schools to determine whether a student is eligible for fee relief, the Department for Education (the department), on behalf of non-government schools, will undertake an objective and external assessment to assess eligibility. The non-government school decides:

- whether to use department advice in deciding to provide fee relief
- how much fee relief and how it is provided to the family.

Individual non-government schools are responsible for determining the value of any financial assistance to be provided to parents and how this will be administered. The financial assistance arrangement is therefore between the non-government school and the parent.

## Eligibility

The Department for Education administers the School Card scheme and the policies relating to this scheme are being applied to parents within the non-government sector to assess eligibility for fee relief. To be eligible to apply for school card assistance, the applicant must be liable for the student's school fees and have a combined family gross income within the school card income limits.

The school card income limits for the Catholic sector reflects that sector's decision to apply a \$20,000 increase plus CPI indexation (Table1).

The school card income limits for the Independent Sector depends on which limit a school has chosen to apply - the higher limit (which reflects an increase of \$20,000 plus CPI indexation) (Table1), or the lower limit (CPI indexation only) (Table2).

Table 1 - Income limits which incorporate the \$20,000 increase and CPI indexation

Number of dependent children	Combined gross family income limit for the 2021/22 financial year	Gross weekly school card income limit
1	\$66,412	\$1,277
2	\$67,598	\$1,300
3	\$68,784	\$1,323
4	\$69,970	\$1,346
5	\$71,156	\$1,369
Each additional dependent child	\$1,186	\$23

Table 2 - Income limits which only incorporate CPI indexation

Number of dependent children	Combined gross family income limit for the 2021/22 financial year	Gross weekly school card income limit
1	\$43,458	\$835
2	\$44,644	\$858
3	\$45,830	\$881
4	\$47,016	\$904
5	\$48,202	\$927
Each additional dependent child	\$1,186	\$23

Combined gross family income for both partners, if partnered on 30 June 2022, includes all the following:

- gross salaries, wages and allowances from their employers
- taxable Centrelink pensions, benefits, allowances
- non-taxable or tax-exempt pensions, benefits, allowances (eg Disability Support Pension, Carers Pension)
- gross interest and dividends
- benefits from the Department of Veteran's Affairs
- supplementary income as identified in the supplementary tax return
- fringe benefits (eg provision of a car, entertainment expenses)
- foreign income including pensions and employment
- business or partnership income from self-employment (includes depreciation).

Combined gross family income does not include any amounts received for:

- Family Tax Benefits Parts A and B
- child maintenance payments
- the TPI component of Veterans Affairs benefits
- carer allowance.

## International students

Full fee-paying international students are not eligible for school card assistance.

International higher education students and their dependents are not eligible for school card assistance.

## Applying for school card assistance

### Who applies

The applicant is the person who must apply (the 'applicant' is the person who is liable for the school fees).

Liability for the school fees is determined as follows.

If the student:

- is not an adult, then the student's parents are jointly and severally liable. In this case, both parents must apply for School Card.
- is an adult (18 years old or older) and a dependant of their parents, the student and the parents are jointly and severally liable. In this case, the parents must apply for School Card.
- is an adult (18 years old or older) and not a dependant (independent), then the student is liable for the charge. In this case, the student applies for School Card.

The parents are jointly and severally liable only when both parents have been given a compliant tax invoice.

If the parents are separated and both parents signed the enrolment form, and the school fee invoice is in the name of both parents (with both parents' names on the invoice), then either parent can apply for School Card. If only one parent signs the enrolment form and the school fee tax invoice is in their name, only that parent can apply for School Card.

## Application forms

School card application forms (online and printable forms) are available on the [South Australian government website's 'education and learning' section](#).

Each application form includes a fact sheet to assist the applicant in completing the form.

If the applicant completes the form online, the applicant and their partners (where applicable) must enter all required information and electronically sign before they can submit their application for assessment.

If the applicant completes the printable form, the applicant and their partner (where applicable) must complete all required sections and sign. The School Card Section will return any incomplete manual applications to the applicant.

To apply for school card assistance, parents, caregivers or independent students must select, complete, and submit the relevant application form below for assessment.

### ED003A – income audit application form

This is the most commonly used school card application. This form is for applicants who:

- are liable for the student's school fees
- have a combined income lower than the applicable eligibility income limit
- are not one of the following:
  - self-employed
  - experienced a change of circumstance in the 2021/2022 financial year (eg separation, loss of employment, additional child in their care)
  - an independent student
  - an adult re-entry student
  - a migrant who arrived in Australia after 1 July 2021
  - receiving Veteran's Affairs benefits
  - applying for a foster child in your care.

#### Processing the form

Online application forms are held centrally and are available on request when required by audit. For submitted hard copy application forms, the school must keep the forms for audit purposes.

The School Card Section electronically transfers the details to Centrelink. Centrelink then verifies that the family's 2021/22 financial year gross income is within the school card income limits for the number of dependent children.

Centrelink advises the School Card Section if the applicant is eligible or ineligible.

Following the Centrelink audit process, the School Card Section will notify:

- applicants of their eligibility or ineligibility
- the school of the applicants' status.

## ED003Y – independent student application form

This form is for applicants who live independent from their parents and are receiving Independent Youth Allowance as at 28 February 2023 and are being invoiced for school fees.

### Unique assessment requirements

When completing the form, the student must enter their own customer reference number (CRN) in both the applicant field and student CRN field. The School Card Section will verify that the applicant is receiving this Centrelink benefit as at 28 February 2023.

### Processing the form

Online application forms are held centrally and are available on request when required by audit. For submitted hard copy application forms, the school must keep the forms for audit purposes.

The School Card Section electronically transfers the details to Centrelink to confirm that the applicant meets one of the following criteria:

- they are receiving the Independent Youth Allowance as at 28 February 2023
- their gross weekly income as at 28 February 2023 is within the School Card income limits for the number of dependent children.

Centrelink advises the School Card Section if the applicant is eligible or ineligible.

Following the Centrelink audit process, the School Card Section will notify:

- applicants of their eligibility or ineligibility
- the school of the applicants' status.

## ED003B – hardship, change of circumstance and self-employed application form

This form is for applicants who meet one of the following criteria:

- earned an income for 2021/22 that was more than the School Card limits, but experienced hardship in the 2021/22 financial year; or
- experienced a change of financial circumstances during the 2021/22 financial year up to and including 28 February 2023; or
- are self-employed.

More information on these 3 scenarios is detailed below.

### Unique assessment requirements

#### *Experiencing hardship*

Applicants can apply on hardship grounds if they meet the following hardship criteria:

- earned more than the school card eligibility income limits; and
- experienced hardship in the 2021/22 financial year that resulted in the family's average weekly gross income being within the school card income limits for the 2021/22 financial year (based on the number of dependent children).

When assessing hardship criteria applications, any extraordinary or unavoidable expenses during the 2021/22 financial year will be deducted from the family gross income. Extraordinary and unavoidable expenses are:

- out of pocket medical or dental expenses (actual cost after insurance, Health Fund or Medicare claims have been deducted)
- expense for caring for a person with a disability, including cost of respite care
- travel and accommodation expenses incurred by families for ongoing medical treatment
- other extraordinary or unavoidable expenses (eg funeral expenses).

Extraordinary and unavoidable expenses do not include:

- mortgage or rent
- school fees and other educational expenses
- motor vehicle expenses
- child support or maintenance expenses
- general living expenses (including but not limited to food, clothing, recreation, repairs, local government rates and taxes, power and telephone)
- financial services expenses (eg hire purchase repayments)
- one-off expenses for replacement of household items (eg refrigerator, hot water service)
- private health insurance premiums
- loss from business ventures or investments where primary income source is from salary or wages.

Applicants applying under the hardship criteria must give the School Card Section a copy of the applicant's (and applicant's partner's, where applicable) 2021/22 full individual tax return and details (including copies of receipts) of the extraordinary and unavoidable expenses which occurred during the 2021/22 financial year.

#### *Change in financial circumstances*

An applicant can apply under this eligibility criteria if:

- they experienced a significant change in the 2021/22 financial year or from 1 July 2022 to 28 February 2023 inclusive; and
- the change results in the family's average weekly gross income being within the school card income limits.

A significant change of circumstances includes:

- ceasing employment
- a reduction in the number of hours employed
- a change of marital or family circumstances
- a child or children coming into your care.

Applicants applying under these criteria must give the School Card Section documents detailing the change. The applicant must also provide proof of the family's gross weekly income from 1 July 2022 (or the date the circumstances changed) to 28 February 2023 inclusive. The assessor will consider the average weekly family's gross income from 1 July 2022 (or the date the circumstances changed) to 28 February 2023.

#### *Self-employed*

If the applicant or the applicant's partner was self-employed during the 2021/22 financial year, applications must include the following information for the applicant (and their partner, if applicable) for the 2021/22 financial year:

- full and complete individual income tax returns
- business or partnership tax returns
- business or partnership profit and loss statements
- a business or partnership depreciation schedule
- a Centrelink PAYG payment summary showing any non-taxable Centrelink income received.

## Processing the form

Online application forms are held centrally and are available at request when required by audit. Manual hard copy application forms are submitted to the School Card Section, where they are held for audit purposes.

The School Card Section will assess the applicants' income. The assessment will be determined on the financial information provided by the applicant, as detailed on the application fact sheet. Following the assessment, the School Card Section will notify:

- applicants of their eligibility or ineligibility
- the school of the applicants' status.

## ED003M – migrant application form

This form is for applicants who have either:

- arrived in Australia after 1 July 2021
- been released from a detention centre after 1 July 2021.

## Unique assessment requirements

Newly arrived migrants receiving an income (salary or benefits) must submit all the following with their application:

- a copy of their visa
- a copy of the school fee invoice for 2023
- Centrelink income statement showing all taxable and/or non-taxable income (where applicable) for the 2021/22 financial year
- proof of any other income in addition to Centrelink income.

If a sponsor family supports the newly arrived migrant applicant, the sponsor family must submit all the following with their application:

- a copy of the newly arrived migrant's visa
- a copy of the sponsor's full 2021/22 tax return
- Centrelink PAYG payment summary showing all taxable and/or non-taxable income (where applicable) for the 2021/22 financial year.

## Processing the form

Online application forms are held centrally and are available at request when required by audit. Hard copy application forms are submitted to the School Card Section, where they are held for audit purposes.

The School Card Section will assess the applicants' income. The assessment will be determined on the financial information provided by the applicant, as detailed on the application fact sheet. Following the assessment, the School Card Section will notify:

- applicants of their eligibility or ineligibility
- the school of the applicants' status.



## ED003V – veteran’s application form

This form is for applicants who receive Veteran’s Affairs benefits.

### Unique assessment requirements

Veterans applying for school card assistance must submit all the following with their application:

- a copy of the Veterans’ Affairs income advice for the 2021/22 financial year for the applicant (and partner, if partnered at 30 June 2022)
- a copy of the applicant (and applicant’s partner’s, where applicable) full individual income tax return (not the notice of assessment)
- if self-employed, a copy of their full business or partnership tax returns.

### Processing the form

Online application forms are held centrally and are available at request when required by audit. Hard copy application forms are submitted to the School Card Section, where they are held for audit purposes.

The School Card Section will assess the applicants’ income. The assessment will be determined on the financial information provided by the applicant, as detailed on the application fact sheet. Following the assessment, the School Card Section will notify:

- applicants of their eligibility or ineligibility
- the school of the applicants’ status.

## ED003F – informal and formal care agreement (previously foster) application form

This form is for applicants where one or more students, as at 28 February 2023, either:

- are under an informal care agreement (informal foster arrangement); or
- have come into care through a court order (formal foster arrangement); or
- where the child or children are being cared for by grandparents, other family members or caregivers.

### Unique assessment requirements

Applicants with either informal or formal care arrangements are not required to provide financial information as the applications are not assessed against the school card income limits.

Applicants applying under the informal or formal care agreement criteria must attach with their application either:

- a photocopy of the relevant correspondence from the Department of Child Protection or a court order that states the care arrangements of the child
- the student’s Centrelink Card which shows ‘FO’, indicating they are a foster child, or the applicant’s Centrelink Card which lists the student as a dependent.

### Form processing

Online application forms are held centrally and are available on request when required by audit. Hard copy application forms are submitted to the School Card Section, where they are held for audit purposes. Following the assessment, the School Card Section will notify:

- applicants of their eligibility or ineligibility
- the school of the applicants’ status.

# Non-government school responsibilities in processing applications

## For forms ED003A and ED003Y

Schools must complete the '2023 non-government schools applicant data spreadsheet' (spreadsheet) that is sent to them by the Department for Education.

The department sends the spreadsheet on the following dates:

- Term 1: 6 February, 27 February and 27 March
- Term 2: 15 May and 19 June
- Term 3: 7 August and 11 September
- Term 4: 23 October and 20 November (FINAL Assessment for 2023).

The spreadsheet will have the online applicants' details already filled out.

Do not add any applicants that have already been entered either by your school or another school – this is to ensure duplicate records are not entered into the department's school card system.

To complete the spreadsheet:

1. Open the spreadsheet supplied by the department.
2. If relevant, check the online applicants' details are correct in both the 'Data File' tab and 'Address File' tab.
3. If relevant, add whether the student is Aboriginal or Torres Strait Islander to the online applicants' details.
4. Open the 'Data File' tab if not already open.
5. Enter the following information:
  - current term (eg term 1)
  - current date.
6. Enter the following data from the manual (paper) application forms:
  - 10-character Centrelink number (first 9 characters are numerical and the tenth is alphabetical) – take extra care entering this number, it must be exactly as shown on the Health Care Card, Pensioner Concession Card or Centrelink correspondence
  - the primary cardholder's (applicant's) surname
  - the primary cardholder's (applicant's) given names
  - student's surname
  - student's given names
  - student's date of birth with the format DD/MM/YY, eg 22/10/10
  - student's year level (0 to 12)
  - yes or no to whether the student is Aboriginal or Torres Strait Islander
  - the term the student started at the school (1 to 4)
  - student's site number
  - student's Centrelink number.
7. Once all manual applications have been entered in the 'Data File' tab, add the letter 'Z' in the first 3 columns (ie column A, B and C) of the row after the final record. This indicates that there are no more records in this tab.
8. Open the 'Address File' tab.
9. Check the term number is correct.

10. Check the date is correct.
11. Check the applicant's Centrelink number and surname is correct.
12. Enter the applicant's address, specifically:
  - o house number
  - o street name
  - o suburb
  - o post code.
13. Once all manual applications have been entered in the 'Address File' tab, add the letter 'Z' in the first 3 columns (ie column A, B and C) of the row after the final record. This indicates that there are no more records in this tab.
14. You should now have completed both tabs and entered all manual applications.
15. Save the spreadsheet for your records.
16. Open the 'Data File' tab and save it as a CSV file (the CSV file is an option in the drop down menu in the 'save as' window).
17. Save the CSV file with the file name 'nnnn-ddmmyy' (where nnnn stands for school number and ddmmyy represents the current date, eg 11 February 2023 is 110223).
18. An information box will appear that says 'The selected file type does not support workbooks that contain multiple sheets'. Click 'OK'.
19. A further information box will appear. Click 'Yes'.
20. The 'Data File' tab is now saved as a CSV file.
21. Open the 'Address File' tab and save it as a CSV file with the file name 'nnnn-add-ddmmyy' (where nnnn stands for school number and ddmmyy represents the current date, eg 11 February 2023 is 110223).
22. An information box will appear that says 'The selected file type does not support workbooks that contain multiple sheets'. Click 'OK'.
23. A further information box will appear. Click 'Yes'.
24. The 'Address File' tab is now saved as a CSV file.
25. You should now have 2 CSV files.

Once you have both CSV files, email them by the due date (listed below) to School Card Section at [education.ngsschoolcard@sa.gov.au](mailto:education.ngsschoolcard@sa.gov.au). In the subject line of the email, please enter the term and your 4 digit school number.

Due dates to email the CSV files:

- Term 1: 10 February, 3 March and 31 March
- Term 2: 19 May and 23 June
- Term 3: 11 August and 15 September
- Term 4: 27 October and 24 November (FINAL Assessment for 2023).

If the CSV files are not received by the due date stated above, then it will not be processed until the next Centrelink audit (ie after the next due date).

## For forms ED003B, ED003M, ED003V and ED003F

Applications are wholly managed by the Department for Education.

## Transferring students

Applicants can only be approved for School Card once per calendar year. Transferring students are managed between schools.

# Determine application status

After Centrelink have completed their audit, the School Card Section will send the applicant a letter informing them of their eligibility status. Additionally, School Card Section will send schools a report listing their school card applicants and their application status. The report will show one of the following status options for each applicant:

- eligible
- not eligible
- mismatch
- additional information required
- awaiting assessment
- seeking approval.

The following describes what each status means.

## Eligible

The applicant is listed as eligible and is approved for school card assistance for 2023.

## Not eligible

The applicant is listed as not eligible and is not approved for school card assistance for 2023. If the applicant disagrees with this result and has more information to support their request, they can apply for reassessment of their application (see the reassessing application section for more information).

## Mismatch

The applicant's details have not been recorded correctly. Therefore, the application may not be able to be assessed by Centrelink, returning from the audit process as 'mismatches'. These appear on the update school card register report as 'Mismatch'. A mismatch report is produced and sent to schools for analysis and correction. Any corrections must be written on the mismatch report and sent to the School Card Section at [education.ngsschoolcard@sa.gov.au](mailto:education.ngsschoolcard@sa.gov.au) by the requested date. The following are the most common reasons for mismatches:

- the primary cardholder's CRN has been incorrectly recorded
- the first nine digits must be numeric and the tenth (last character) must be alpha
- the family name was not spelt exactly the same way as it appeared on the Health Care Card, Pensioner Concession Card or Centrelink correspondence
- the applicant has changed their family name since submitting the school card application form and therefore a match could not occur for income verification purposes.

## Additional information required

The applicant's income cannot be assessed. The School Card Section will send a notification to the applicant requesting that they complete a re-assessment form. The applicant must complete the form and return it

within 28 days for manual assessment. The most common reasons for 'additional information required' include:

- the applicant (or partner) was not required to lodge an income tax return for the 2021/22 financial year and have not notified Centrelink
- the applicant (or partner) was required to lodge a tax return for the 2021/22 financial year but have not done so.

## Awaiting assessment

This applicant has sent an application to the School Card Section, which is waiting to be assessed.

## Seeking approval

The applicant has sent an application to the School Card Section without the required documentation. The School Card Section has contacted the applicant, requesting more information to enable assessment of their application.

## Reassessing applicants

An applicant applying for a reassessment must submit a reassessment application form (ED003R) with of one or more of the following attachments (the type of attachment depends on the applicant – see the forms section if unsure which one is required):

- a full individual taxation return for the applicant and partner (if partnered at 30 June 2022) for the 2021/2022 financial year
- Centrelink PAYG payment summary showing a taxable or non-taxable income (eg Disability Support Pension, Parenting Payment, JobSeeker) for the applicant and partner (if partnered at 30 June 2022) for the 2021/2022 financial year
- Veterans Affairs' Payment Summary for the applicant and partner (if partnered at 30 June 2022) for the 2021/2022 financial year
- proof the student is receiving Youth Allowance at the independent rate as at 28 February 2023
- a statement explaining the reason for requesting a reassessment
- other documentation as applicable.

## Closing date for applications

No new applications can be accepted after 24 November 2023 unless extraordinary circumstances apply. The School Card Section determines extraordinary circumstances. To apply under extraordinary circumstances, contact the School Card Section to find out what is required.

# Record history

Published date:

## Approvals

Status: Approved

Version: 1.1

Policy officer: Manager Financial Services

Policy sponsor: Director, Budget and Financial Services

Responsible executive director: Chief Financial Officer, Finance and Funding division

Approved by: Chief Operating Officer

Approval date: 27 January 2023

Next review date: 1 December 2023

## Revision record

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Approved by: Chief Operating Officer

Approved date: 27 January 2023

Next review date: 1 December 2023

Amendment(s): annual update, plain English edits

## Keywords

School card, school card application, financial assistance, fee relief, low income, non-government

## Contact

Business unit: School Card Section

Email: [education.ngsschoolcard@sa.gov.au](mailto:education.ngsschoolcard@sa.gov.au)

Phone: GPO Box 1152, ADELAIDE SA 5001

Phone: 1800 672 758 (freecall)

Do not contact Centrelink with any school card issues.