

Making and Using an Enduring Power of Attorney (EPOA)

Intake Form

1. Identify caller ☐ The Person (Principal) ☐ Family/Friend ☐ Attorney
☐ 3rd Party: eg Carer; Service/Health provider _____
2. Reason for call
General enquiry -> [FLOWCHART 1. Making an EPOA](#)
Specific enquiry -> [FLOWCHART 2. Using an EPOA](#)
3. Is there a valid EPOA? ☐ Yes -> Question 4
☐ No -> [FLOWCHART 1. Making an EPOA Qld; ADA Resources](#)
4. Is there more than one Attorney? ☐ Yes -> Question 5 ☐ No -> Question 6
5. How are decisions made? ☐ Severally ☐ Jointly ☐ Majority ☐ Successively
6. What decisions can be made? ☐ Financial ☐ Personal/health ☐ Financial and personal/health
-> [FLOWCHART 2. Using an EPOA Pt. 2a – c](#)
7. When does the power for Financial matters begin? ☐ Immediately ☐ Specific date ☐ Loss of capacity ☐ Other
8. Are there any special terms included in the EPOA? ☐ Yes Specify _____
☐ No

Below are sample questions to assist you in identifying how best to assist and refer the caller.

The Person

- Is your attorney making decisions for you currently?
- Which decisions are being made? -> [FLOWCHART 2. Using an EPOA Pt. 2a – c](#)
- Are you included in the decisions and how is that working out for you? -> [ADA Australia Resources](#)
- Have you had any recent medical assessments? What did they say?
- Has your doctor said you need help to make decisions?

Finances

- Do you have enough money for the things you need or things you like to do?
- Are you able to access information about your finances such as your pension or bank statements?

Accommodation/services

- Where do you live?
- Do you have help (services) at home, if so, what type?
- Do you feel safe where you live?

Residential care

- Tell me about your facility. Do you enjoy the daily activities or the outings?
- Do your family or friends visit or contact you?
- Has anybody been prevented from visiting or contacting you?

Are you aware you can take steps to change your attorney? -> [FLOWCHART 3. Actions of an Attorney Pt. 2a](#)

The Attorney(s)

- Are you aware of your legal duties and responsibilities as attorney? -> [ADA Australia Resources](#)
- Has the person's capacity been formally assessed? What were the results? -> [FLOWCHART 2. Using an EPOA Pt. 4](#)
- Have you started making decisions for the person? What type of decisions have you made? -> [FLOWCHART 2. Using an EPOA Pt. 2a – c](#)
- Are you including the person in decision making, as you are required to do? -> [ADA Australia Resources](#)
- Have you provided copies of the EPOA and assessments to relevant organisations? eg banks; service providers; health professionals? -> [FLOWCHART 2. Using an EPOA Pt. 1](#)
- Are your decisions being questioned by anyone? -> [FLOWCHART 3. Actions of an Attorney Pt. 2a.](#)
- Have you considered meeting with the person or others who may be questioning your decisions to explain the reasons for certain decisions?
- Has an application been made to QCAT to review or remove you as attorney? -> [FLOWCHART 3. Actions of an Attorney Pt. 2a](#)

Do you wish to continue acting as attorney? -> [FLOWCHART 3. Actions of an Attorney Pt. 3](#)

Mediation can assist to resolve disagreements, have you or others considered this as an option?

3rd Parties

- Are you aware how an attorney should act and make decisions? -> [FLOWCHART 3. Actions of an Attorney Pt. 1; ADA Australia Resources](#)
 - Are you concerned about the person's -
 - Accommodation, health, care needs, social isolation or general wellbeing?
 - Finances?
 - Problems about contact with family/friends/health professionals/services?
- Are you concerned/disagree with a decision or actions of the attorney? Why? -> [FLOWCHART 3. Actions of an Attorney Pt. 2](#)

Have you discussed this with the attorney?

- Yes. What was the response?
- No. Is there a reason why you have not spoken to the attorney?

Referral & Resources.

Queensland Government Publications (EPOA forms): www.publications.qld.gov.au/

Office of the Public Guardian: Ph. (07) 3234 0870 or 1300 653 187 www.publicguardian.qld.gov.au

Public Trustee of Queensland: Ph. 1300 360 044 www.pt.qld.gov.au

Queensland Civil and Administrative Tribunal (QCAT): Ph. 1300 753 228): www.qcat.qld.gov.au

Aged and Disability Advocacy Australia: www.adaaustralia.com.au/resources/ada-resources/

Support organisations.

Aged and Disability Advocacy Australia: Ph. (07) 3637 6000 or 1800 818 338 www.adaaustralia.com.au

Carers Queensland: Ph. (07) 3900 8100 or 1800 242 636 www.carersqld.asn.au

COTA Queensland: Ph. (07) 3316 2999 www.cotaqld.org.au

Elder Abuse Prevention Unit (EAPU): Ph. (07) 3867 2525 or 1300 651 192 www.eapu.com.au

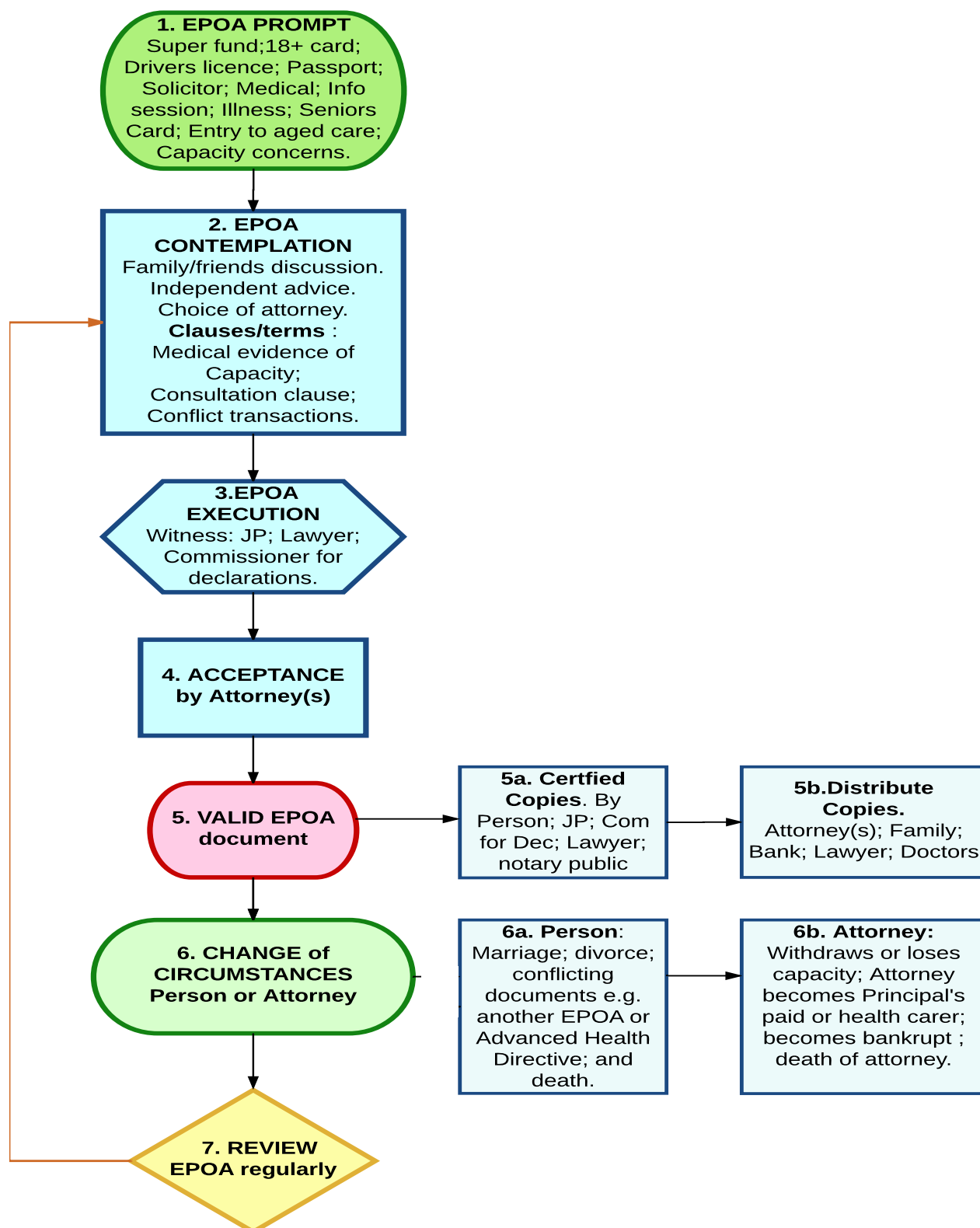
Queensland Advocacy Incorporated (QAI): Ph. (07) 3236 1122 www.qai.org.au

Seniors Legal and Support Service (SLASS): Ph. (07) 3214 6333. For regional phone numbers see: www.qld.gov.au/seniors/legal-finance-concessions/legal-services/

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Flowchart

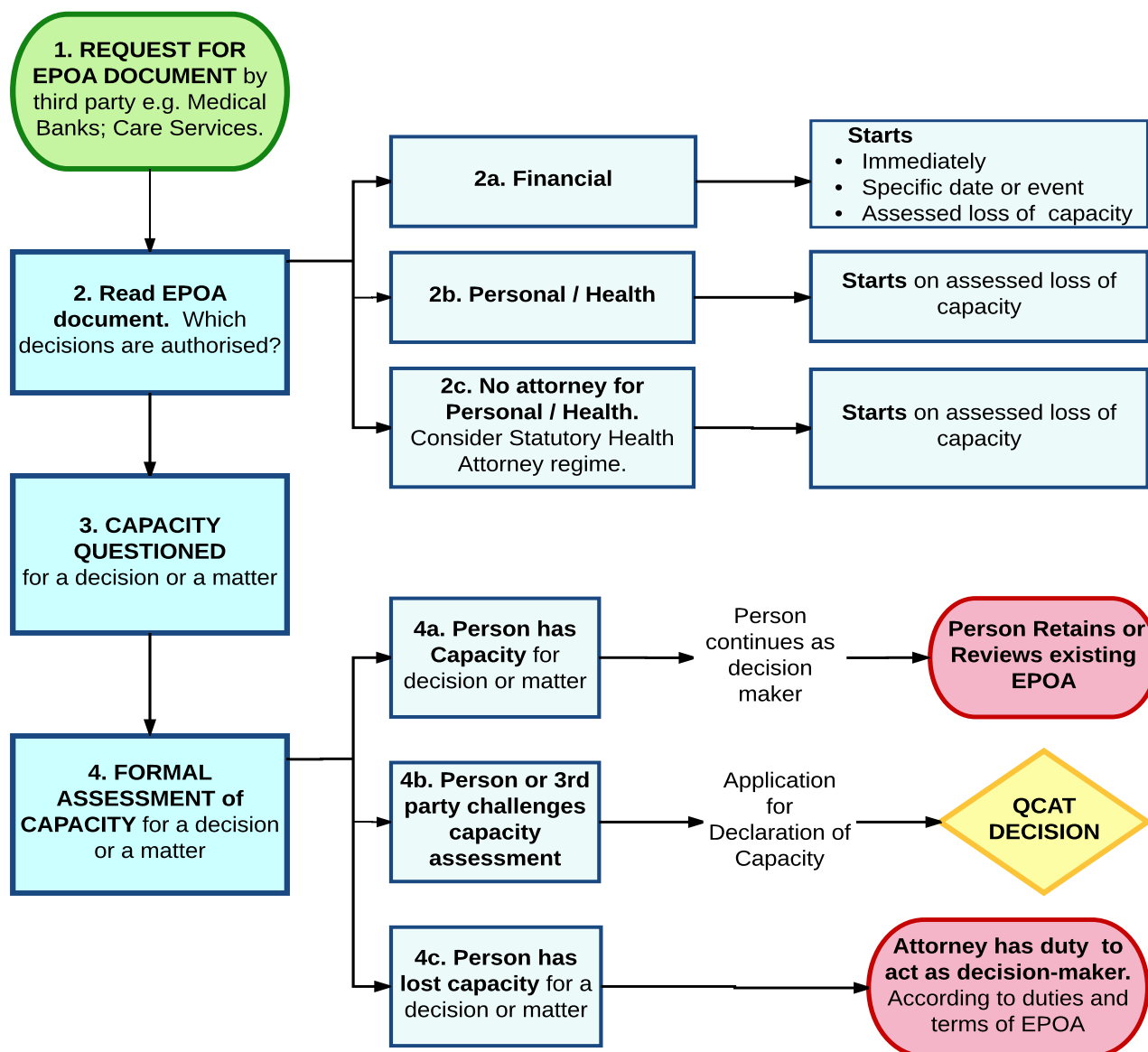
1. Making an EPOA



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Flowchart

2. Using an EPOA



3. Actions of an Attorney

