

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

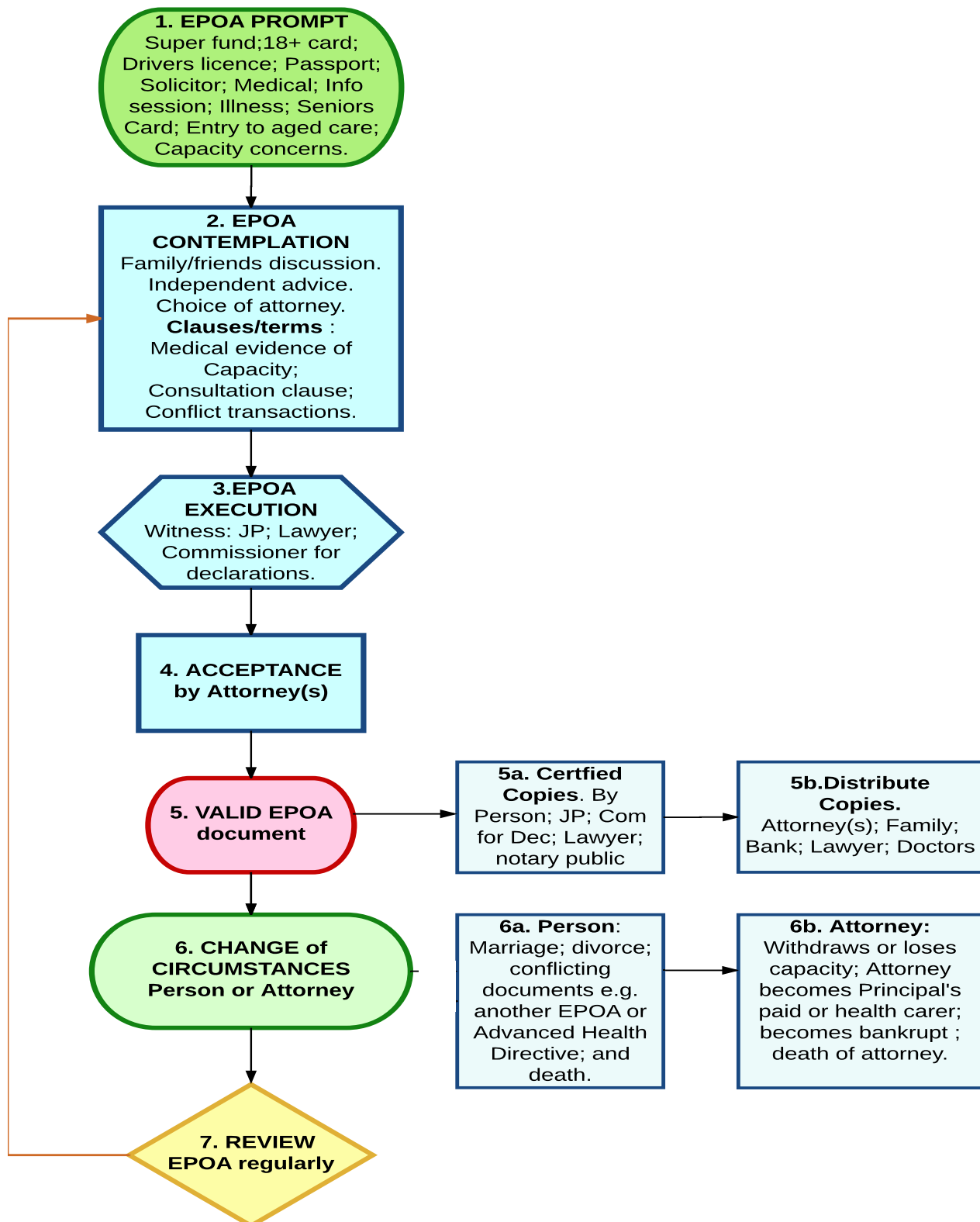
Queensland Advocacy Incorporated (QAI): Ph. (07) 3236 1122 www.qai.org.au

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/

Making and Using an Enduring Power of Attorney (EPOA)

Flowchart

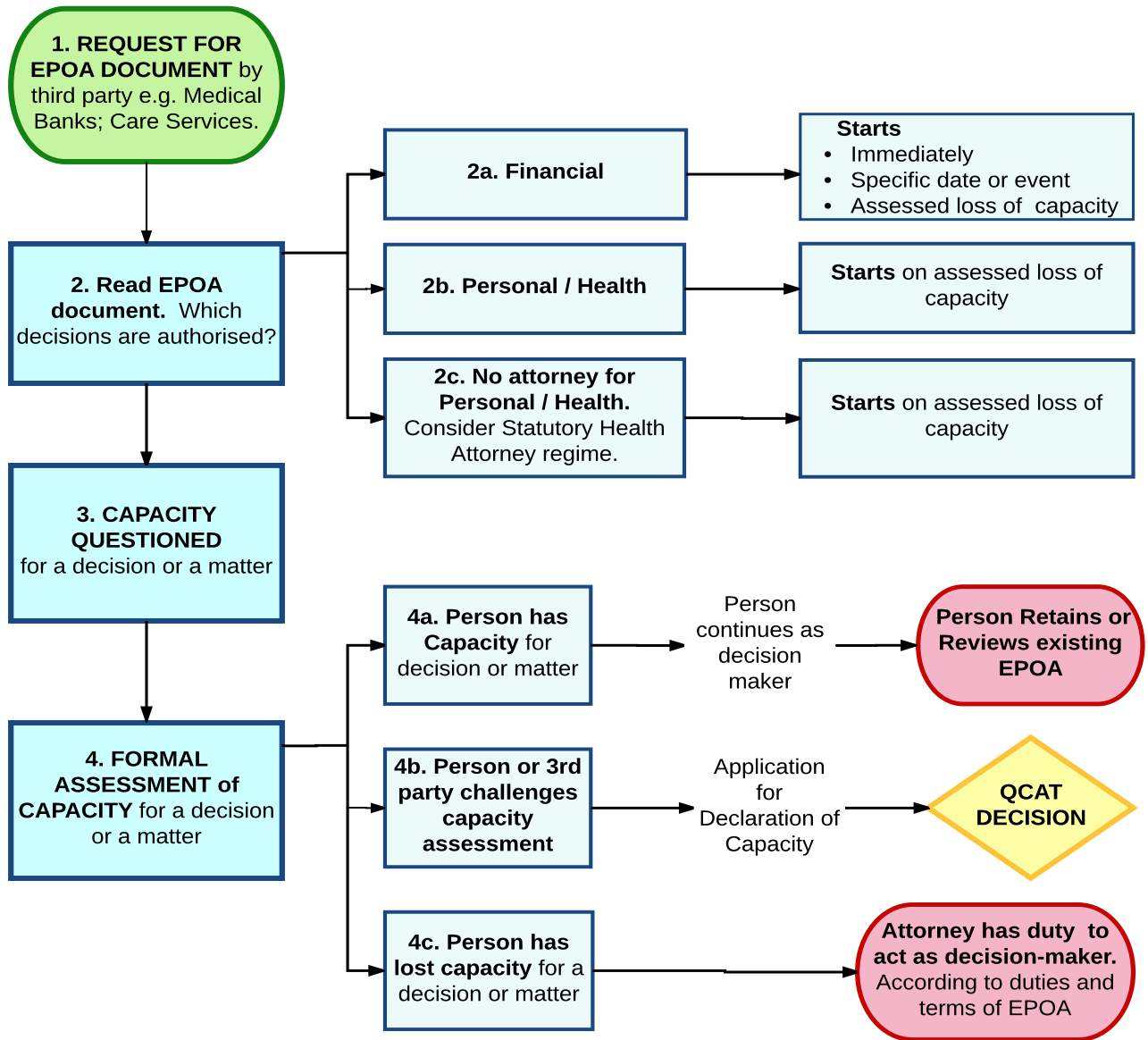
1. Making an EPOA



Making and Using an Enduring Power of Attorney (EPOA)

Flowchart

2. Using an EPOA



3. Actions of an Attorney

