

# 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/](http://www.publications.qld.gov.au/)

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

Public Trustee of Queensland: Ph. 1300 360 044 [www.pt.qld.gov.au](http://www.pt.qld.gov.au)

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

Aged and Disability Advocacy Australia: [www.adaaustralia.com.au/resources/ada-resources/](http://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](http://www.adaaustralia.com.au)

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

COTA Queensland: Ph. (07) 3316 2999 [www.cotaqld.org.au](http://www.cotaqld.org.au)

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

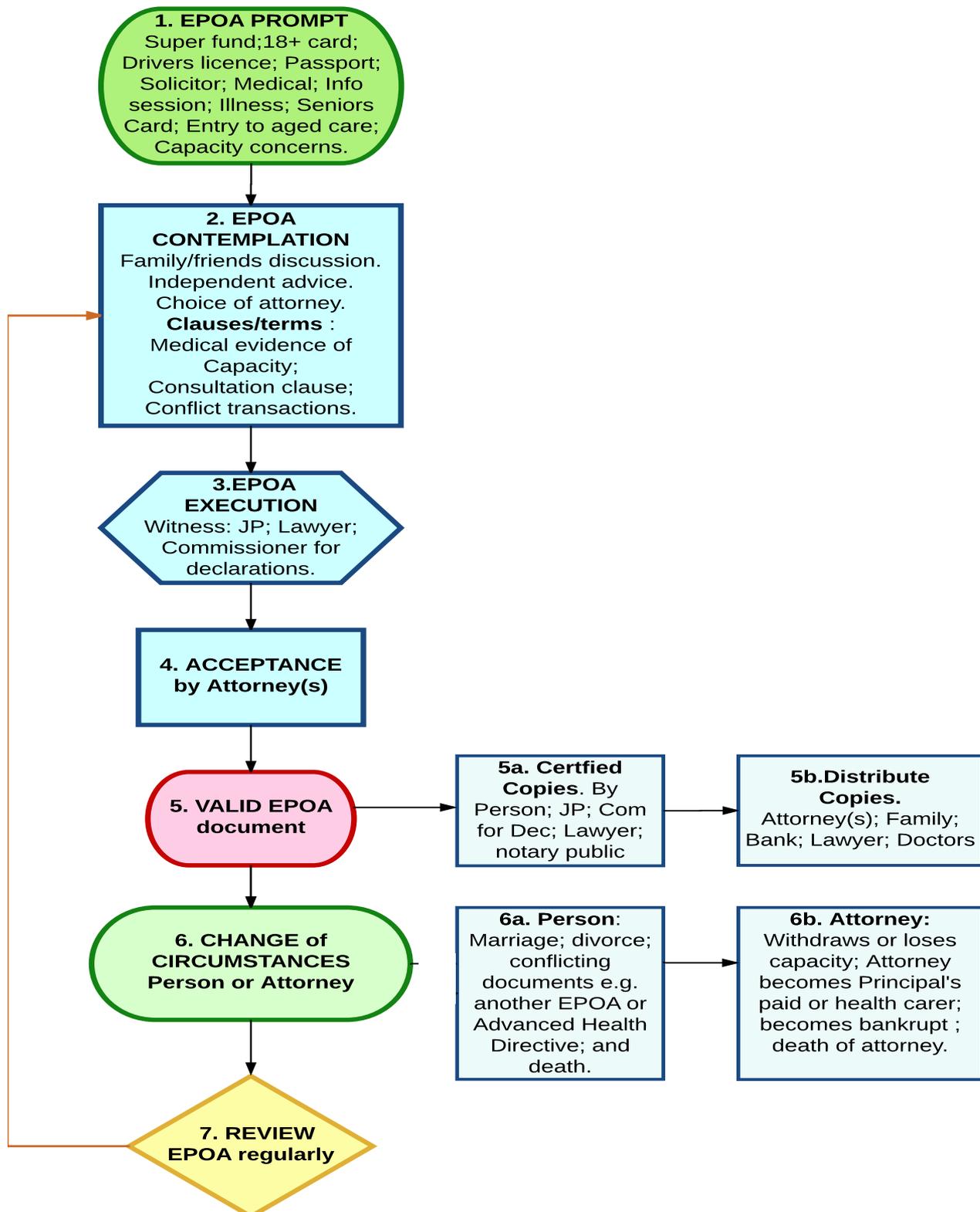
Queensland Advocacy Incorporated (QAI): Ph. (07) 3236 1122 [www.qai.org.au](http://www.qai.org.au)

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/](http://www.qld.gov.au/seniors/legal-finance-concessions/legal-services/)

# Making and Using an Enduring Power of Attorney (EPOA)

# Flowchart

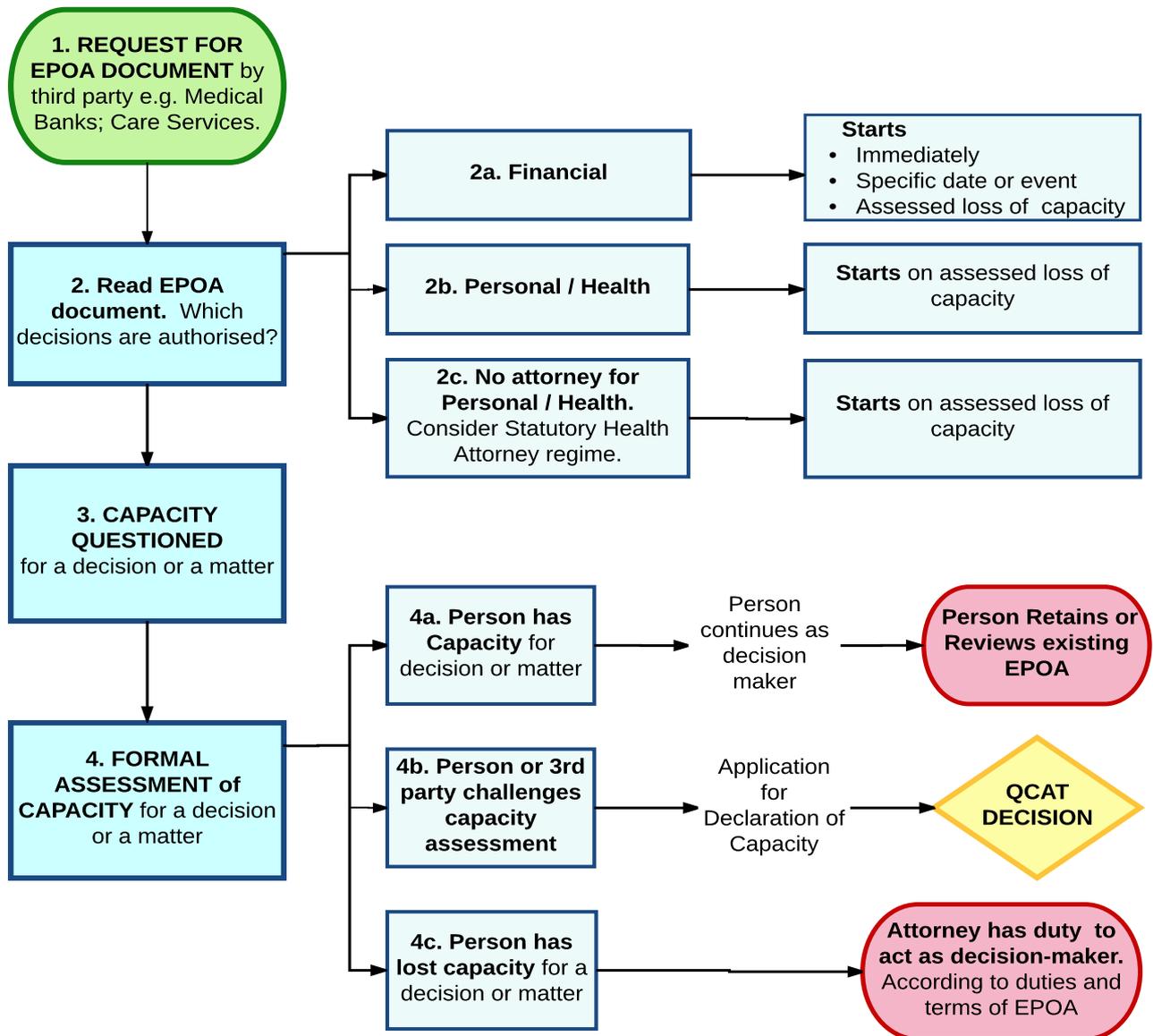
## 1. Making an EPOA



# Making and Using an Enduring Power of Attorney (EPOA)

# Flowchart

## 2. Using an EPOA



## 3. Actions of an Attorney

