

2019

Legatee Training and Development Program

MODULES 6 - 9

Introduction

Training Modules 6 - 9

6. Making Contact with Beneficiaries

7. Understanding the Department of Veterans' Affairs (DVA) and Pensions

8. Aged Care Support and Positive Ageing

9. Working with Families, Youth and People with a Disability

Upon completion of these modules you will have an understanding of:

- how to provide support to beneficiaries;
- the services the Department of Veterans' Affairs provides; and
- the resources available to you to in your role as a Legatee.

Whether you are an experienced Legatee or a newcomer, these modules will help you to expand on your knowledge of the Legatee role gained in Training Modules 1 - 5 and provide you with an understanding of what is required to undertake the task of supporting the families of those who have given their lives or health in defence of our nation.

Module 6: Making Contact with Beneficiaries



Aim: Legatees will gain an understanding of how to communicate with beneficiaries and the process and steps involved in making initial contact.

Rapport

Rapport is an emotional bond or friendly relationship between people based on a mutual liking, trust and sense that they understand and share each others' concerns.

Rapports helps to create:

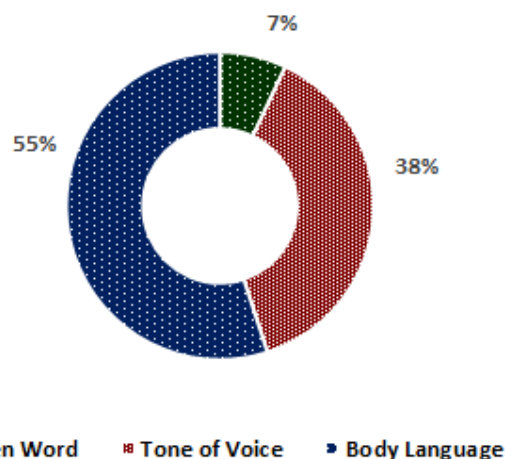
- mutual trust; and
- build lifelong relationships.

The first visit to a Legacy beneficiary is all about rapport-building.

How can we Build Rapport?

Communication, both verbal and non-verbal, builds rapport. Words, tone and pace of speech, and body language all contribute in establishing a relationship.

Communication



Mehrabian's model of Communication



Remember!

Tone and pace of speech

Eye contact

Body language

Mirroring

First Contact – Points to Remember

A beneficiary may be experiencing substantial grief when first contact is made. It is important to let them talk, let them cry, let them do both. Be guided by what the beneficiary needs.

Always ascertain if the beneficiary has family and friends and whether they live near by and if they are supportive. Encourage the beneficiary to talk about their support networks.

Do	Don't
Listen	Block or judge their emotions
Empathise	Project your own beliefs or feelings
Be patient	Rush your beneficiary with anything they are not ready to do or share

The 6 Essential Elements of Contact



1. Arrange and prepare for visit

2. Conduct the visit

3. Agree on actions

4. Implement actions

5. Maintain good records

6. Update Legacy House staff

Step 1: Arrange and prepare for visit

On initial contact:

- introduce yourself over the telephone;
- discuss the work of Legatees and the purpose of the visit;
- arrange a suitable date and time to meet;
- invite family member/s to attend (should a beneficiary wish);
- provide the contact details for Legacy House and encourage the beneficiary to call if they require assistance or have concerns .eg. about scams or privacy;
- complete the 'Legatee Home Visit Pre-Screen' (**Attachment A**) with the beneficiary; and
- be sure to always respect the wishes of the beneficiary.

If you are unable to make contact with the beneficiary by telephone, send a letter of introduction.

Before conducting the visit:

- ensure you have the beneficiary's name, address and contact number;
- remember to read through the enrolment form, previous notes and any other documentation provided;
- do not attend a beneficiary's home unannounced; and
- contact Legacy House for assistance if you have any concerns about the visit.





Step 2: Conduct the visit

On arrival, greet and introduce yourself and show the beneficiary your Legatee ID card. During the visit, ensure that you enquire about the beneficiary's:

- health and wellbeing;
- mobility;
- safety / security; and
- support networks available.

Discuss with the beneficiary the work of Legacy to help them understand all of the services provided.

Observations during a Home Visit

 Personal Hygiene	 Home Chores
<ul style="list-style-type: none">Cleanliness of clothesUntended woundsOdourHair brushedClean nails (particularly toe nails)	<ul style="list-style-type: none">ShoppingLaundryDishesGardenAccessing the bank and understanding bills
 Home Assessment	 Mental Clarity
<ul style="list-style-type: none">Clean / tidyAccess / steps / grab railsTrip hazardsJammed doorsWeather stripsHeating / cooling	<ul style="list-style-type: none">MemoryRemembering sequences of eventsKnowing who to call if they have a problem

Step 3: Agree on Actions

Develop a plan with the beneficiary and write it down. Examples include:

- enrolling with Legacy;
- applying for a pension;
- joining a Widows Club; and
- accessing assistance from the Community Services Team at Legacy House.

As part of developing the plan, decide with the beneficiary:

- what assistance from family and others will be needed to support the plan;
- who will need to be made aware of the plan;
- what phone calls will need to be made;
- what paperwork will need to be found; and
- what your visit schedule should be.

Step 4: Implement Actions

This will vary depending on the actions being undertaken but may include:

- phone calls to Legatees, the local Branch, the Widows Club and Legacy House;
- internet searches; and
- your own knowledge and expertise.

The Legacy House Community Services Team is your Primary Resource

The Community Services Team has expertise in provision of:



Information and Guidance

Financial Support

Assessment


Referrals

Advocacy

Home visits

A resource which can be directly accessed is **Open Arms – Veterans and Families Counselling**
www.openarms.gov.au.

This service provides free and confidential nation-wide counselling and support for war and service-related mental health conditions such as post traumatic stress disorder, anxiety, depression, sleep disturbance and anger.



Support is also available for bereavement, relationship and family matters that can arise due to the unique nature of military service.

Veterans and their families can access this service by calling **1800 011 046**.

Step 5: Maintain Good Records

Maintaining good records is essential for continuity of care and identifying issues that may arise over time.

Good record keeping can be achieved by:

- using the Enrolment Form provided by Legacy;
- using the 'Legatee Contact Notes' (**Attachment B**) form provided by Legacy;
- utilising hand-held devices for note-taking;
- taking handwritten notes;
- using the 'Legatee's Monthly Contact Report' (**Attachment C**) form provided by Legacy;
- making use of computer based notes / files; and
- emailing the Community Services Team at Legacy House.

Step 6: Update Legacy House Staff

The Legacy House Community Services Team must be regularly updated on a beneficiary's:

- health, safety and general wellbeing;
- home environment;
- moving into aged care;
- accessing home care services;
- suspected elder abuse (any form).

Summary and Key Learnings

By now you should have an understanding of:



- how to engage with beneficiaries; and
- the steps that must be followed when making contact with a beneficiary.

Module 7: Understanding the Department of Veterans' Affairs (DVA) and Pensions



Aim: Legatees will gain a general understanding of the role of DVA and the requirements to be met in assessing eligibility for a War Widows Pension (WWP).

Department of Veterans' Affairs

The Department of Veterans' Affairs (DVA) is an Australian Government agency which administers legislation including:

- Veteran's Entitlement Act 1986 (**VEA**)
- Defence Services Homes Act 1918
- Military Rehabilitation and Compensation Act 2004 (**MRCA**)
- Safety Rehabilitation and Compensation Act 1988 (**Defence Related Claims – DRCA**)
- War Graves Act

DVA provides information and advice for veterans and their dependants, including war widows, along with a range of health and other support services .eg. rehabilitation, counselling and home care for veterans and their dependants.

In addition, DVA is responsible for various pensions and entitlements including the War Widows Pension (WWP) and associated Gold Card. DVA assesses the eligibility of a veteran or a widow for a pension or an entitlement based on a range of complex eligibility factors. Eligibility factors vary depending on the pension or entitlement being applied for.

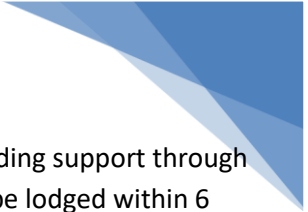
Further information on the the Department of Veterans' Affairs, inclusive of services and forms, can be accessed via the DVA website www.dva.gov.au.

War Widows Pension (WWP)

A WWP is paid to compensate widowed partners of veterans who have died as a result of war service or eligible defence service.

A WWP may be automatically paid to a widow following the death of a veteran if the veteran received:

- an Extreme Disablement Adjustment / TPI (special rate); or
- TTI (temporary special rate);
- TR (intermediate rate); or
- POW (prisoner of war).



However, many widows need to apply for a WWP and Legacy has a role to play in providing support through the application process. As a note, to attain all possible benefits, the WWP claim must be lodged within 6 months of the date of the veteran's death.

What does a WWP include?

The WWP is a fortnightly payment which is not taxed and does not have to be declared as income on a tax return.

All recipients of a WWP are issued with a Gold Card which entitles them to a range of health care services.

In addition, an income support supplement is available, however this payment is regarded as income and is asset tested.

Please refer to the DVA website www.dva.gov.au for details of the current payment rates for the WWP and the income support supplement.

Legacy's role in WWP

There are a number of criteria affecting eligibility for a WWP and a Gold Card and the application process can be complex.

Legacy's Pension Officer will support a widow to lodge a pension claim with DVA and must be consulted before the claim process is commenced.

Note: Legatees can undertake DVA training in Compensation (via ATDP as detailed in Module 4) however this is optional and at the discretion of the individual Legatee. ATDP training is complex and provides varying levels of competency which must be strictly adhered to when providing advice. Professional Indemnity Insurance provided under the VITA framework **will not** apply if advice is given outside the parameters of the level of training undertaken.

The Legacy Pension Officer is provided as the primary resource to facilitate pension claims for widows.

A Legatee's role in the WWP application process

All pension applications are facilitated by the Melbourne Legacy Pensions Officer.

Legatees can support the widow to understand what a WWP is and if they might be eligible along with assisting in the gathering of documents to support their application.

Documents which are required to support an application are inclusive of:

- proof of identity;
- a certified copy of the veteran's death certificate; and
- evidence of military service.

With the widow's permission, Legacy can obtain copies of the veteran's DVA file which often contains the medical and military history which is required to support the WWP application process.

Evidence of military service

The DVA Nominal Roll website www.nominal-rolls.dva.gov.au provides information on members of Australia's defence forces who served during:

- World War Two;
- the Korean War;
- the Vietnam War; and
- the First Gulf War.

Through the DVA website, you can also access nominal roll websites for the Boer War and World War One as well as the National Archives.

Establishing eligibility

A War Widows Pension is granted on the presumption that there was a **link** between the cause of the veteran's death and their **war service**.

These links can be verified by accessing the **Statement of Principles (SOPs)** on the DVA website.

The SOPs contain definitions and details for most conditions, illnesses and diseases and defines the factors which must be satisfied for the veteran's medical condition / death to be accepted as service related.

The Melbourne Legacy Pensions Officer will be able to identify whether the cause of death can be related to an SOP and whether a claim may be submitted.

If an SOP is identified, the Pensions Officer and Legatee will work out a plan of action to gather the required information and documents to substantiate the claim and the timelines which will need to be met.



Remember!

Receiving a WWP can make a significant difference to a widow's life.

It is very important not to raise expectations or make promises about receiving a WWP.

Inaccurate information on a WWP claim can affect the assessment of entitlements.

Legacy's Pension Officer is your primary resource. Ensure that the Pensions Officer is consulted before the claim process is commenced.

Summary and Key Learnings

By now you should have an understanding of:



- the services which the Department of Veterans' Affairs provides; and
- how a beneficiary can access a War Widows Pension.

Module 8: Aged Care Support and Positive Ageing



Aim: Legatees will gain a general understanding of active ageing and how Legacy and Legatees can support older people to live full and healthy lives. Legatees will also gain an understanding of how to assist older people to access aged care support.

Ageing Research

Ageing research shows:

- Most people live active and healthy lives.
- It is only in the last few years of a person's life that health and wellbeing capacity can profoundly diminish.
- Many illnesses associated with ageing can be prevented and / or the onset delayed through active, social and purposeful lives.
- Many illnesses associated with ageing are, in fact, not a normal part of ageing.

Remaining Independent

Helping to maintain an older person's independence is possible by ensuring:


- adequate physical activity;
- eating a healthy diet;
- seeking regular medical and allied health advice;
- taking correct medications / pharmaceuticals;
- keeping socially connected.

Connecting older adults to services which help them to remain as independent as possible, both in the home and in the community, is key to Legacy's support.

How Legacy can help with achieving Active Ageing

Legacy can assist with achieving active ageing by providing:

- weekly gentle exercising classes;
- monthly walking groups;
- reduced cost theatre tickets;
- monthly concerts at Legacy House;
- an annual Christmas concert;
- stamp ladies fundraising volunteers;
- a range of other activities and programs.



Being part of Legacy also provides the widow with the opportunity to join a **Widows Club** in their local area. The Widows Clubs organise a range of activities for members including:

- excursions;
- luncheons;
- meetings and social gatherings;
- fostering of friendships; and
- connections with Legatees and the broader community.

How Legacy can assist Financially

Legacy can provide financial assistance to eligible beneficiaries for items such as:

- prescription medications;
- incontinence aids;
- medical expenses;
- allied health services;
- general living expenses;
- housing repairs / services;
- medical transportation;
- LAMBS (non White and Gold Card); and
- transportation to Legacy House.

In order for a beneficiary to be provided with financial assistance, a 'Financial Assistance Application' form must be completed and returned to Legacy House.

On receipt of the application form, a Case Manager is assigned to the beneficiary. The Case Manager then prepares a written submission to the Widows (pre 1991) Committee who decides to either accept, reject or modify the request. The beneficiary is then advised of the Committee's decision.

How Legacy can assist with Information and Support

The Community Services Team at Legacy House provide information and support regarding:


- the Federal Government's 'My Aged Care' service;
- NDIS;
- transportation;
- DVA;
- Centrelink;
- accommodation;
- community agencies and services; and
- a range of other agencies and services available to beneficiaries and their families.

How Legacy can assist with Advocacy and Referral

The Community Services Team at Legacy House provide advocacy and referral regarding:

- elder abuse and family violence;
- financial assistance;
- 'My Aged Care';
- NDIS;
- DVA;
- Centrelink;
- accommodation;
- community agencies and services; and
- a range of other agencies and services available to beneficiaries and their families.

An Overview of Ageing



"The aged are as diverse in their characteristics as the young. Certainly not all seniors are high achievers, any more than they are decrepit... they are rich, poor, powerful, independent, vigorous, disabled, devout, atheistic, rigid, adventurous, lonely, gregarious, married, single... and any combination."

Source: *E Job in J Davis "Older Australians – A Positive View of Ageing"*

A Legatee should always encourage and ensure our older beneficiaries:

- understand the household finances;
- have a Power of Attorney in place;
- understands and can withstand financial scams;
- has a current will; and
- has reached an agreement with a family member about their ageing.

If any concerns arise from discussions with beneficiaries relating to any of the above matters, call the Community Services Team at Legacy House immediately for assistance.



Supporting people to stay at Home

Many services aim to support people to remain independent and in their own homes. An overview of available services is provided below which should be read in conjunction with the information provided on the 'My Aged Care' website www.myagedcare.gov.au.

The Community Home Support Program

The Community Home Support Program can provide in-home services which are inclusive of:

- home help;
- home nursing;
- personal care for people who need assistance with showering and dressing;
- meals on wheels (delivered meals);
- social support;
- planned activity groups;
- property maintenance;
- respite services that let carers take a break from their caring role; and
- allied health such as physiotherapy and podiatry.

Community Nursing

Community nursing provides clinical nursing and / or personal care services in the home by registered and enrolled nurses and support staff to:

- restore health following illness;
- allow the person to maintain the best level of independence; and
- allow for a dignified death.

Services can include medication management, wound care and hygiene assistance.

Veterans Home Care

For Gold Card holders with high levels of personal care needs, DVA will pay for all clinical nursing services.

To qualify, the Gold Card holder needs to be assessed by a local Medical Officer as requiring more than one-and-a-half hours per week of assistance.

Note: For White Card holders to qualify for nursing assistance, the condition must be an accepted disability.



Rehabilitation Appliances Program (RAP)

Gold or White Card holders with an assessed need can access aids or appliances to help maintain independence in the home. Aids or appliances can include:

- continence products;
- mobility and functional support aids;
- personal response systems;
- home medical oxygen;
- diabetic supplies;
- continuous positive airways pressure (CPAP) supplies.

These appliances can be provided based on a clinical needs assessment by a healthcare professional.

Government or Private Service Providers

Some older people prefer to use private providers for domestic assistance. These services often cost more but can be more flexible and can provide assistance which is not within the scope of government providers.

Accessing In-Home Services

Home Care Packages

A home care package is a coordinated package of services and is funded by the Australian government. There are four levels of home care packages:

1. Supporting people with basic care needs.
2. To support people with low level care needs.
3. To support people with intermediate care needs.
4. To support people with high care needs.

In-home services are determined based on a Regional Assessment Service (RAS) being completed.

A trained assessment officer visits the older person at home to see how they are getting on and to talk with them about their goals and needs. The assessor works out if the older person is eligible for in-home services and the types of in-home services they require.

Veterans Home Care Services (VHC)

DVA also offers a Veterans' Home Care program for people in receipt of a WWP / Gold Card.

This service is very basic and suits low-level needs. To access this service, an assessment can be made over the telephone.

Residential Aged Care Services

Residential aged care is for older Australians who can no longer live at home due to frailty or disability. Residential aged care services provide older people with continuous supported care, namely accommodation and nursing.

General information on residential aged care can be accessed through the 'My Aged Care' website www.myagedcare.gov.au or by calling 'My Aged Care' on **1800 200 422**.

The primary resource for Legatees regarding residential aged care services is the Legacy House Community Services Team.

Following consultation with the Community Services Team, a Legatee may be required to organise a home visit to discuss residential aged care options with the older person.

During the visit, the Legatee may need to guide the older person in how to register with 'My Aged Care' and a copy of the DPS Guide to Aged Care in Victoria should be provided. The DPS Guide provides useful information to assist in the decision-making process.

Financial Considerations

Making the decision to move to residential aged care can be daunting.

The older person must get independent and qualified financial advice from someone experienced in aged care when making this decision.

The DPS Guide is useful for the family in that it:

- poses some questions to ask;
- lists accommodation options;
- explains about selling the family home;
- explains rights and responsibilities; and
- lists specialist consultants who provide expertise (at a possible cost).



Some facts to know ...

Aged care homes can be owned and operated without government approval.

Fees can vary significantly between different places.

There are many changes to the financial side of aged care and it is wise for the individual to become well informed prior to committing to a financial decision.

No Legatee or staff member is permitted or qualified to give legal or financial advice

Always remember

With all involvement, **what the older person wants takes precedence over what others think they need** except in circumstances when:

- their personal safety or other's personal safety is at risk; and
- they are unable to make decisions due to reduced cognitive function.

Summary and Key Learnings

By now you should have an understanding of:



- what aged care support services are available to beneficiaries;
- services for widows with Gold / White Cards; and
- how a beneficiary can be supported in positive ageing.

Module 9: Working with Families, Youth and People with a Disability



Aim: Legatees will gain an understanding of the different types of support that Legacy can provide for families, youth and people with a disability.

Legacy's support for Families

Legacy has supported the families of deceased and incapacitated veterans since 1923.

Legacy's long-term commitment strives to provide families with an element of comfort and security they had prior to their loss.

Melbourne Legacy and Families

Melbourne Legacy provides a range of support services for the families of transitioning and ex-serving members of the Australian Defence Forces (ADF) who are ill, injured or deceased as a result of their service (this includes mental health).

In recent years, a significant number of veterans have been identified as experiencing incapacitation due to mental health issues. DVA has reported that up to 29% of veterans have an accepted mental health condition as a result of their service. Service-related suicide is a growing concern.

Civilian life can be challenging for many veterans and their families. Legacy offers a range of support services which are tailored to the needs of each family.

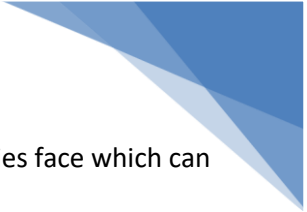
The Legacy House Community Services Team follows a 'case management' model of support to these families and works in partnership with other organisations as required.

Families Program

Melbourne Legacy's Families Program has been developed to meet:

- the changing dynamics of Legacy's beneficiaries; and
- the number and location of families being referred for support.

Working partnerships have been established with Allied Health and other welfare agencies to obtain a cross-referral network. Collaborative partnerships have also been developed with DVA and the Department of Defence – Defence Community Organisation (DCO) in order to focus on early intervention for those transitioning out of the ADF due to incapacity.



The Families Program has been developed to address some of the difficulties that families face which can include living with:

- long absences;
- mental health issues;
- employment difficulties;
- adjustment to civilian life;
- anger management;
- domestic violence;
- substance abuse;
- lack of resilience and self-esteem;
- financial literacy;
- social isolation;
- de-skilling of the non-serving parent;
- living away from family; and
- behavioural changes such as OCD, self harm and emotional detachment.



Remember!

Dealing with the families of post 1991 veterans can be complex.

Always refer to the Community Services Team at Legacy House before engaging with the family of a post 1991 veteran.

Legacy and Young People


The children and youth that Legacy support are referred to as 'Junior Legatees' (JL).

A JL is the son, daughter, stepson, stepdaughter, adopted child or other child who is dependent on the deceased or incapacitated person.

A JL is generally defined as being:

- under the age of 18 years; or
- undertaking secondary or tertiary education (normally only up the age of 25 years); or
- disabled or who becomes disabled.

Melbourne Legacy provides case management support to young people via the Community Services Team at Legacy House.



The Community Services Team provides support, programs and initiatives that are targeted, personal, inclusive and provide every opportunity for our JL's to thrive in a nurturing environment.

The support which Legacy offers to young people and youth is determined based on their age and individual needs, for example:

Primary School

- recreational activities; and
- individual support needs where required .eg. mental health support services.

Early Secondary School

- leadership programs;
- programs to assist in the transition to secondary school; and
- social activities.

Late Secondary School

- professional development programs; and
- mental health support programs.

Secondary School Graduates / University Students

- professional development and mental health programs; and
- workshops to develop skills in gaining employment opportunities.

Ongoing relationship with Legacy

Many of the children / youth who have received Legacy support continue to be involved in Legacy in later years. As adults, many former JL's become involved with Legacy again as:

- volunteers / work experience students;
- guest speakers at commemoration events;
- public relations ambassadors;
- Legatees continuing Legacy's work; and / or
- staff members.

Legacy and People with Disabilities

Melbourne Legacy is committed to respond to the well-being needs of people with disabilities for the whole of their lives.

Currently, the average age of beneficiaries with disabilities is late 60's.

Melbourne Legacy assists the family and carers of adults with disabilities. Disabilities may include:

- intellectual disabilities;

- physical disabilities; and
- mental health diagnoses.

The Legacy House Community Services Team regularly liaises with beneficiaries, their families and their support staff to ensure needs are being met. The Community Services Team also provides support, information, advocacy and referrals with regards to:

- housing;
- financial assistance;
- NDIS; and
- other agencies and support services.

Always refer to the Community Services Team at Legacy House for support with disabled beneficiaries and their families.

Summary and Key Learnings

By now you should have an understanding of:



- what support services Legacy provides to families, youth and people with a disability.

Attachment A

Legatee Home Visit Pre-Screen

Version	1	Dated	22 May 2019
Delegated		Approved by	CEO
Authority	CSM	Scheduled review date	22 May 2020

Beneficiary Name:		Legacy ID:	
Home Address:		Phone Number:	
Visiting Legatee:		Date of contact:	

Phone the beneficiary and ask the following:

ASK	YES	NO	COMMENTS
Is the house number visible from the road?	<input type="checkbox"/>	<input type="checkbox"/>	
Is access to the house via the front door?	<input type="checkbox"/>	<input type="checkbox"/>	
Are there any stairs or uneven surfaces before entering the premises?	<input type="checkbox"/>	<input type="checkbox"/>	
Do you have any pets? If so, can they be secured?	<input type="checkbox"/>	<input type="checkbox"/>	
Will others be present at the visit? If yes, who?	<input type="checkbox"/>	<input type="checkbox"/>	
Are you agreeable to the home visit scheduled for _____?	<input type="checkbox"/>	<input type="checkbox"/>	
Do you have any questions about the home visit?	<input type="checkbox"/>	<input type="checkbox"/>	

Before visiting the beneficiary check the following:

- If you have any concerns about visiting the beneficiary, please speak with a Case Manager in Community Services BEFORE conducting a visit.
- Ensure you have an up-to-date photo identification card (with police check number listed).
- Ensure you have made contact by phone before attempting home visit (DO NOT visit unannounced).
- If you cannot make contact by phone a letter should be sent to the beneficiary requesting they contact you or Legacy House.

If in doubt always speak to your Branch Contact Secretary or a Community Services Case Manager at Legacy House.

Attachment B

Legatee Contact Notes - email to csv@legacymelb.com.au

Legatee name: Branch:

Copy provided to Contact Secretary (tick as appropriate) Yes No

Beneficiary name: Date of contact:

Beneficiary address:

.....

Beneficiary telephone number(s):

Purpose of visit (tick as appropriate): Initial visit Social Welfare Check

Details:

Discussed:

Issues arising:

Action (tick as appropriate):

No further action Action by Legatee Action by CS staff

Details:

Office use only

File number: Assigned Case Manager:

.....

Entered on database: Y N By: Date:.....

Attachment C



Legatee Monthly Contact Report Form

Date: Legatee Name:

Branch: Contact Secretary:

Widow Name	Reference	Date of Contact/Visit	Comments

Signature: