

The Public Trustee and the National Disability Insurance Scheme

Q What is the National Disability Insurance Scheme?

The National Disability Insurance Agency (NDIA) is implementing the National Disability Insurance Scheme (NDIS – the Scheme). The NDIS provides funding for ‘reasonable and necessary’ supports which help people with a disability achieve their goals, become more independent, take part in social and community activities, and have the opportunity to enjoy an ordinary life. To receive supports under the NDIS you must be under 65 years of age and be an Australian citizen or a Permanent Resident or hold a Protected Special Category Visa. You must also reside in an area where the NDIS is available.

The NDIS also helps families and carers with information about services to support people with a disability. Since the NDIS rollout began in July 2016, Queenslanders who are eligible for the NDIS have been moving from state funded disability services to the national scheme.

Q What is the role of the Public Trustee as financial manager?

The Public Trustee may be appointed to make financial decisions on behalf of an adult who has been determined to lack capacity to make those decisions. The appointment may be under an existing Enduring Power of Attorney or a decision of the Queensland Civil and Administrative Tribunal (QCAT) under the *Guardianship and Administration Act 2000*. The Public Trustee must act in accordance with the legislation and any directions of QCAT.

The Public Trustee’s financial management clients have access to a personal Trust Officer, who develops a Financial Management Plan (budget) for the client’s funds and assists the client to manage his or her income and investments and pay accounts and bills.

The Public Trustee does not manage the funding provided for supports under the NDIS, because these are not part of a client’s personal funds.



Q What services does the Public Trustee offer?

The Public Trustee has been providing services to Queenslanders for over 100 years including Will making, which the Public Trustee performs free of charge, Enduring Powers of Attorney, Deceased Estate Administration and Financial Administration for adults with reduced capacity to make decisions. We have extensive experience and expertise in acting as Administrator and Financial Attorney.



The Public Trustee

Q What is the Public Trustee's role in the NDIS Pathway?

Step 1 The Public Trustee will send a letter to our clients (or their assisting person – a family member, carer or guardian) advising when the NDIS is due to be rolled out in their region. The letter will advise if the Public Trustee considers, based on the NDIS criteria, that the client may be eligible for NDIS services.

Step 2 During the NDIS roll-out, it is up to the client, or their assisting person – to make contact with the NDIA by telephoning 1800 800 110 to find out if the client is eligible for the Scheme. To do this, the client (or their assisting person) needs to make an Access Request over the telephone so the NDIA can make a decision on eligibility for the Scheme. As part of this process the NDIA will create an NDIS profile and provide a nine digit NDIS Reference Number. The NDIA will send an Access Request Form to clients (or their assisting person) in the post for completion and return to the NDIA.

In certain circumstances if there is a need for urgent assessment by the NDIA, the Access Request Form can be filled out over the telephone by the NDIA. After receiving an Access Request Form, the National Access Team (NAT) will assess the eligibility of a potential participant and may request further evidence of residency, age or disability.

If the NDIA decides that the client is eligible for the NDIS, a NDIS Planning Meeting will be arranged so the NDIS Plan can be developed.

Step 3 Prior to the NDIS Planning Meeting, the client (or their assisting person) should contact the Public Trustee to advise us of their meeting date with the NDIS.

Step 4 The Public Trustee will send the client (or their assisting person) a copy of the client's current budget and account statements for the client's funds that are managed by the Public Trustee prior to the NDIS Planning meeting. This information will assist the meeting attendees to determine how the available NDIS supports will work with the client's existing financial position.

Step 5 The client attends the NDIS Planning meeting with their support network (family/carers) or legally appointed Guardian. The NDIS Planning meeting may happen in person or by telephone.

After the NDIS Planning meeting, an NDIS Support Coordinator may be appointed to help the client implement the NDIS Plan.

Step 6 The Support Coordinator, or if no coordinator is appointed, the client's assisting person, should contact the Public Trustee to ensure the client's funds are sufficient and appropriate to support the NDIS Plan.

Q Will the Public Trustee help me develop my NDIS Plan?

The Public Trustee does not develop NDIS Plans and is not involved in the NDIS planning process. The NDIS Planner will prepare your plan in consultation with you and your support network. A Support Coordinator or NDIS Local Area Coordinator (LAC) may also be appointed to help manage your NDIS Plan.

For more information: www.pt.qld.gov.au and www.ndis.gov.au

NDIS Pathway for Public Trustee Client



1 The Public Trustee sends letter advising if client may be eligible for NDIS services.

2 The client (assisting person) contacts NDIS and makes appointment for NDIS Planning meeting.

3 The client (assisting person) advises the Public Trustee of the NDIS Planning meeting date.

4 The Public Trustee sends the client (assisting person) their budget and account statements prior to NDIS Planning meeting.

5 The client and assisting persons attends NDIS Planning meeting and Support Coordinator is appointed.

6 The Support Coordinator or assisting person contacts the Public Trustee to ensure client funds are sufficient to support the NDIS Plan.

Support and funding provided.

The Public Trustee

Supporting our clients

As part of her NDIS Plan, Sue will be going to Occupational Therapy each week at the local pool. The Public Trustee is Sue's Financial Administrator and they manage her budget. After Sue and her family worked with the NDIA on her Plan, her Support Coordinator liaised with the Public Trustee to ensure she had enough money in her weekly budget to pay for entry to the pool and something to eat after her therapy session. The NDIA agreed to pay for Sue's Occupational Therapist, her transport to and from the pool and for a Support Worker to escort her to and from the pool.

Sue will need to have sufficient personal funds available for her pool admissions and a snack for each pool visit.



As part of his NDIS Plan, George and his family have requested a specialised wheelchair that will give George some more independence. George lives in a residential care facility that provides care in line with the Quality of Care Principles. The care facility is responsible for providing George with his accommodation, his bed, a standard wheelchair, food and any support he requires while he is at the facility.

The Public Trustee is George's Financial Administrator and therefore responsible for the administration of his residential care fees and living expenses (including authorisation of spending money when he takes a day trip outside the facility).

Under George's NDIS Plan, the NDIS has agreed to pay for a specialised wheelchair, a Support Worker to take him out on day trips so he can access community activities related to his personal goals and assistance with transportation to these activities where the assistance is required as a result of George's disability.

Barb lives independently in her own home. The Public Trustee is Barb's Financial Administrator. The Public Trustee budgets for and pays for Barb's expenses (from her own money) including food, electricity, insurance, rates etc.

As part of the NDIS Plan, Barb has requested regular yard maintenance and a Support Worker to come and assist her with housework and attending events where Barb requires assistance as a result of her disability.

These are considered to be reasonable and necessary supports approved under her NDIS Plan.

For more information visit: <https://www.ndis.gov.au/about-us/our-sites/QLD>

These stories are examples only. Other people may receive a different amount of funding, or may be given funding for different things. The Public Trustee can only provide general information. Funding under the National Disability Insurance Scheme is decided through the National Disability Insurance Agency. Contact the National Disability Insurance Agency on 1800 800 110 to find out more about your situation.



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www.pt.qld.gov.au

