

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?

As Financial Administrator or Attorney, the Public Trustee is often appointed by Queensland Civil and Administrative Tribunal (QCAT) to make financial decisions, and legal decisions related to financial matters, on behalf of an adult who has incapacity for decision making. As Administrator we must act in accordance with the provisions of the *Guardianship and Administration Act 2000* and the directions of the QCAT Order.

When we are appointed as Financial Administrator we provide our Financial Management clients with access to a personal Trust Officer, a Financial Management Plan (budget), payment of accounts and bills and management of income and investments. The funding for supports under NDIS does not form part of a client’s personal funds. Therefore, the Public Trustee does not manage these funds.



Q What services does the Public Trustee offer?

The Public Trustee has been providing services to Queenslanders for over 100 years including free Will making, 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.



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 family/carers/Guardian) advising when the NDIS is due to be rolled out in their region. The letter will advise if the Public Trustee considers that the client may be eligible for NDIS services.

Step 2 During the NDIS roll-out, it is up to the client (or their family/carers/Guardian) to make contact with the NDIS by telephoning **1800 800 110** to find out if they are eligible for the Scheme. To do this the client (or their family/carers/Guardian) need to make an Access Request over the telephone so the NDIS can make a decision on eligibility for the Scheme. As part of this process the NDIS will create an NDIS profile and provide a nine digit NDIS Reference Number. The NDIS will send an Access Request Form to clients (or their family/carers/Guardian) in the post for completion and return to the NDIS. In certain circumstances if there is a need for urgent assessment by the NDIS, the Access Request Form can be filled out over the telephone by the NDIS.

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. The initial plan will generally be reviewed within the first 12 months. Any future plan will be reviewed periodically unless there are any changes to the client's personal circumstances which may warrant a plan review.

Step 3 Prior to the NDIS Planning Meeting, the client (or their family/carers/Guardian) should contact the Public Trustee and advise us of their meeting date with the NDIS.

Step 4 The Public Trustee will send the client (or their family/carers/Guardian) a copy of the client's budget and account statements prior to the NDIS Planning meeting.

Step 5 The client attends the NDIS Planning meeting with their support network (family/carers/Guardian) or legally appointed Guardian. After the NDIS Planning meeting, the client will be appointed a NDIS Support Coordinator to help them implement the NDIS Plan.

Step 6 The Support Coordinator 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. It is likely that 'Support Coordination' will be included among the 'reasonable and necessary supports'. A Support Coordinator will 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 (family/carers/Guardian) contacts NDIS and makes appointment for NDIS Planning meeting.

3 The client (family/carers/Guardian) advises the Public Trustee of the NDIS Planning meeting date.

4 The Public Trustee sends the client (family/carers/Guardian) their budget and account statements prior to NDIS Planning meeting.

5 The client and family/carers/Guardian attends NDIS Planning meeting and Support Coordinator is appointed.

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

Support and funding provided.

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 NDIS 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 NDIS 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 disability and any transportation related to these activities.



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 take her to community based events related to 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>