

Policy: Benefits Unit

Purpose

To ensure customers receive their legitimate entitlement to concessions, allowances, and income payments and that these payments are made at the correct rate. Income support payments include regular superannuation payments where the customer has no entitlement to capital.

The majority of our customers receive income support payments and most of these payments are administered by the Department of Human Services and the Department of Veterans' Affairs. Some customers also receive payments from other countries.

In many cases, these payments are our customers only source of income. Consequently, ensuring customers are paid all their entitlements and concessions at the correct rate is essential to their financial well-being.

There are also customers who reside in age care facilities whose daily accommodation contribution (DAC), means tested care or income tested fees are affected by the level and frequency of the reporting of the customer's income and assets to Department of Human Services (DHS).

The amount of income support payments received:

- 1 will impact a managed customer's budget
- 2 may also be used in calculating Housing NSW or Community Housing charges.

The Benefits Unit is responsible to:

- 1 ensure customers receive income support payments at the correct rate of payment, where entitled
- 2 when there is a change in the customer's circumstances, ensure entitlements and benefits are reviewed and DHS notified accordingly
- 3 notify providers of changes to a customer's circumstance within the required timeframes
- 4 conduct an annual review of each customer's circumstances to ensure correct entitlements and payments are received
- 5 maintain regular contact with providers to ensure appropriate processes and systems are in place to address issues as they arise
- 6 access on-line services to administer entitlements and payments
- 7 point of contact and co-ordination for access to Centrelink eServices for NSW Trustee & Guardian staff.

Policy statement

Unless the payment is excluded by the financial management order or there is evidence to indicate the customer can manage their income payments under a [section 71](#) authority, NSW Trustee & Guardian will receive directly and manage all such payments on behalf of the customer.

The existence of an income support payment, type and rate, or eligibility for a payment not being received, may be identified by the Client Establishment Team, Benefits Unit, Trustee Service Officers, Financial Planning Unit, or Taxation Unit.

For new directly managed customers, client establishment redirect income support payments and concessions to the customer's trust account.

The Client Establishment Team for directly managed customers will make applications for those payments and concessions to which the customer is entitled. If these are incomplete when the file is transferred to the Service Centres, the assigned trustee officer completes the required actions.

The Benefits Unit is the primary contact between NSW Trustee & Guardian and benefit providers for established customers.

The role of the Benefit Unit is:

- 1 to make application for income support payments and allowances for established customers
- 2 confirm the correct type and rate of income support payments, allowances, and concessions
- 3 ensure that providers are informed of changes to customer circumstances including address, accommodation type, income and assets
- 4 redirect payments to NSW Trustee & Guardian for established customers on receipt of a request from trustee services
- 5 enter via AUSKEY Centrepay deductions, modifications, or cancel as requested by trustee service staff
- 6 to collaborate with trustee services as required to enable effective and efficient outcomes for customer entitlements
- 7 review annually the benefits and entitlements for each customer.

Lump sum advances are generally not approved and can only occur with the approval of the trustee service officer within budget parameters.

Repayments of debts should be negotiated to minimise impact on customers.

The Benefits Unit will have regular contact with Centrelink and Department of Veterans' Affairs to ensure appropriate processes and systems are in place to address issues as they arise.

Scope

Trustee Services Staff, Benefits Team Staff, Financial Planning Staff

Legislative context

- [NSW Trustee and Guardian Act 2009](#)
- [Human Services \(Centrelink\) Act 1997](#)
- [Social Security Act 1991](#)
- [Veterans' Entitlement Act 1986](#)

Related resources

[Self-Management \(Section 71\) Policy](#)

Definitions

ACF	Aged Care Facility
AUSKEY	An application where Benefits Team may update most client income and assets and personal details directly into the Centrelink system. AUSKEY is due for replacement with an improved system by 31/03/2020
Benefit(s)	income support payments received by customers according to their circumstances and including additional allowances such as mobility or rental assistance (most payments are means tested). For the purposes of this policy income support payments include regular superannuation payments where the customer has no entitlement to capital.
Centrepay	is the name of a Centrelink system where authorisation is provided to deduct monies from customer payments to pay other suppliers
Client Establishment:	The service delivery team who are initial point of contact for onboarding FMO customers to NSW Trustee & Guardian
Customer	a managed person identified within the NSW Trustee and Guardian, Act 2009 whose financial affairs are under management by NSW Trustee & Guardian
DAC	Daily Accommodation Contribution
DAP	Daily Accommodation Payment
DFM	Direct Financial Management
DHS	Department of Human Services, aka Centrelink
DVA	Department of Veteran Affairs
FMO	Financial Management Order
FPU	Financial Planning Unit who provide specialist advice
Trust Account	The account with a unique number that records the payment and receipts for each customer

Document information

Title:	Benefits Unit Policy
Owner:	Senior Manager, Financial Planning
Approver:	Director Legal & Professional Services
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