

Personal Things/Personal Money: Admission/Initiation

Purpose:

The purpose of this memo is to provide a better understanding regarding how to set up a system for helping an individual handle his/her personal belongings and/or individual funds when it has been decided, through assessment and placement in the Individual Service Plan, that the provider will be responsible for or will assist the individual with handling his or her things and/or money.

Process:

The Role of the Team:

When it has been determined, through assessment that the provider will help the individual with handling his or her money and things, the team should identify the following and include in the ISP:

1. The responsibilities of the individual, the provider, the payee, the guardian and/or any unpaid natural supports, regarding the individual 's things and/or money should be clearly written in the plan.
 - a) Identify who, if anyone, will be paid to handle the individual's personal belongings and/or funds and identify the limits (Highest amount the provider can spend without team approval, use of ATM/Debit cards, maintenance of receipts, process for balancing accounts to make sure they are correct, etc.) and responsibilities.
 - b) Identify if the individual can handle a portion of his/her things and or money, and identify the limits (i.e.: amount the individual can independently manage, the need for receipts, approval of the use of ATM/Debit cards, etc.) and responsibilities.
 - c) Identify, if applicable, the names and responsibilities of others, who are not paid for providing services, who may be helping with management of the individual's things and/or money (i.e.: natural support, payee, guardian, trustee, etc.).
2. Identify what receipts must be kept by the provider.
3. If the individual has a last will and testament, this should be noted in the plan.
4. If the individual does not have a last will and testament, the need for one may be talked about by the team and an attorney.
5. If it is decided that a last will and testament is not needed, the team should identify a Responsible Agent that will help the individual.
6. Decide if the individual needs insurance for their things and how it will be paid for.
7. Decide if the individual would benefit from a free annual credit report, and if so, decide who is responsible for completing the report.
8. When money, from the state (start-up funds) are used, the plan should show who owns any items purchased with the funds.

9. When the need is written in the ISP, identify a system for watching over the individual's things that are worth \$50.00 or more through the use of a list or other type of tracking system which shows who owns it, if it has been disposed of, and how much it's worth.

The Role of the Provider:

Upon the start of services the provider should do the following:

1. Look at the plan to make sure that it clearly explains the provider's responsibilities for helping an individual with his/ her things and/or money.
2. Provide training to staff that will be helping the individual with his or her things and/or money.
3. When the need has been written in the individual plan, complete an initial list of the individual's things that are worth \$50.00 or more, within 14 days of starting services (Department Recommended Form Attached).
4. Complete a list of the individual's money, for which the provider is responsible, within 14 days of starting services.
5. Start using an Account Transaction Record (Department Recommended Form Attached) for each account for which the provider is helping the person.

The Role of the Individual:

Upon the start of services, the individual should do the following:

1. Let team know what you want/need help with regarding your money and your things.
2. Select the people you want to help you with your money and your things.
3. Make sure that you understand your plan.
4. Ask any questions if you have any.