
APS Policy Bulletin 2023-001

Date: 07/24/2023

DISTRIBUTION: ALL APS STAFF

Financial Management Services Disbursements of Food, Incidentals, Spending Monies

■ **PURPOSE**

The purpose of this bulletin is to inform all Adult Protective Services (APS) Field Office staff who provide case management services to Financial Management Services (FMS) clients that they must receive written approval from supervisory staff for any Food, Incidentals and Spending (FIS) disbursements over \$500.

■ **OVERVIEW**

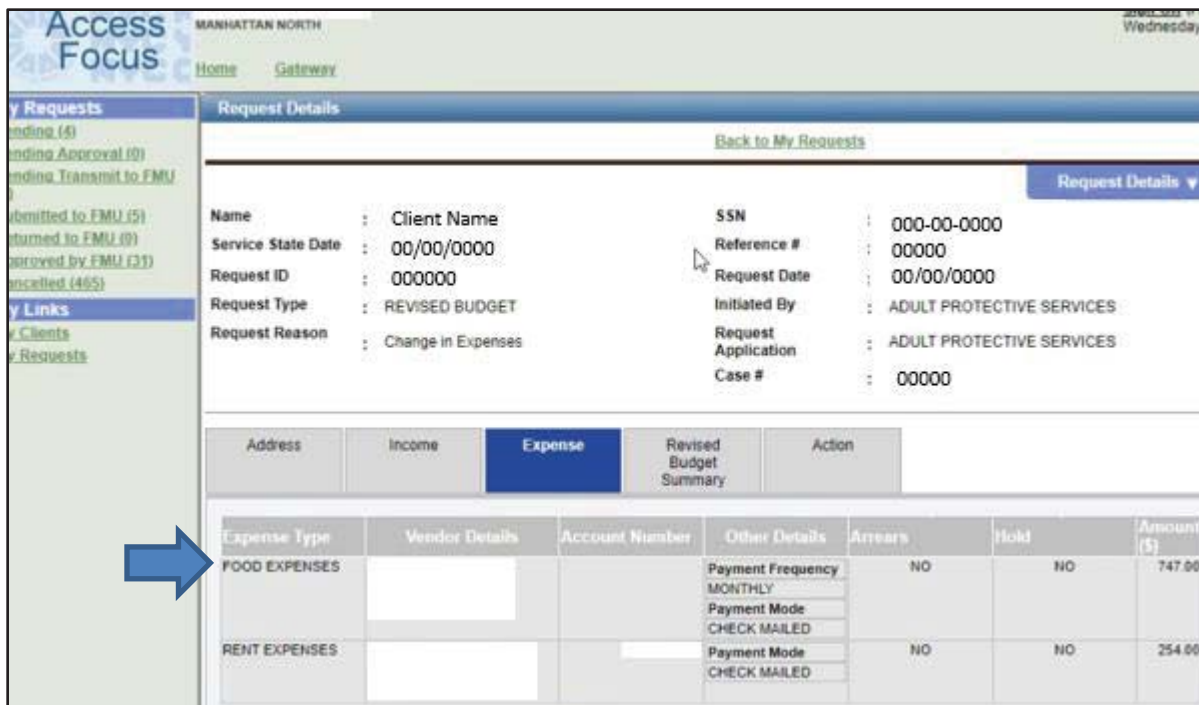
Financial Management Services (FMS) is responsible for the FIS disbursements to eligible clients. Clients receive these disbursements once, twice or four times a month, each for up to \$500. Some clients may be eligible for \$500 or more.

■ **POLICY**

FMS clients generally are not budgeted for more than \$500 in FIS monies for their monthly benefit. If the client requests and the Caseworker determines that the client can manage FIS monies in amount greater than \$500, the APS Director/Deputy Director must send a memo to the FMS Director for budget approval.

■ **REQUIRED ACTION**

The Caseworker must review the expenses budgeted on a client's case. An example of these expenses is in the screenshot on page 2.



To determine if a client can manage FIS benefits greater than \$500, the Caseworker must:

1. Visit the client at home to assess Activities of Daily Living (ADL).
These ADLs are:
 - a. History of good money management of FIS.
 - b. Display good hygiene/self-care.
 - c. Possessing enough food, clothing, and other necessities during home visits, which shows evidence of appropriate incidental spending.
 - d. No evidence of abuse or financial exploitation.
2. Talk with the client about the management of FIS monies.
3. Discuss the ADL criteria with their supervisor, which demonstrate the client's ability to manage FIS funds and care for themselves.
4. Document in APS_NET progress notes by selecting 'Contacts' and then 'Progress Notes', as reflected in the screenshots on page 3:
 - a. the client home visit and discussion, during every home visit, and
 - b. the discussion with their supervisor.

APSNet Production X Close Page

Client Info (Click to Hide)

DOB: 00/00/0000
Age: 00
Sex: N/A
Speaks: English
Translator: N/A

Also Known as:
Nickname
View Demographics
Address
Phone: 000-000-0000

My Quick Links

- **Contacts**
- Documents
- History
- Other People
- Other Agencies
- Medical Insurance
- Identifiers

Assigned To (Click to Hide)

View Assignment Tab
Field Site: Borough
Caseworker: Last, First
CW Phone: 000-000-0000
Supervisor: Last, First

Client Profile Page

Name: First Last
SSN: 000-00-0000
Referral Person ID #: 00000
Current Referral #: 00000
Referral Date: 00/00/0000

Last Updated on: Referral Status: OPEN

[Number of Times Referred: 2]

Generate PDF and Print Client Profile

Navigation Tabs: About Client, News Feed, Activity, My Work, History, Floater Action

Sub-Navigation Tabs: About, Medical, Housing, Finances, Documents, Other Info

Client Description

Height	N/A	Weight	N/A	Eye Color:	N/A
Race	N/A	Ethnicity	N/A	Hair Color:	N/A

Identifying Features:
WANTS TO BE REFERRED: Name
Language for Correspondence: ENGLISH
Other Info: N/A

Reason For Referral

Info for the Current Referral #: 00000 . Date: 00/00/0000
Click Here To Hide Details

Client Information

APSNet Production X Close Page

Client Info (Click to Hide)

DOB: 00/00/0000
Age: 00
Sex: N/A
Speaks: English
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Also Known as:
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Client Profile Page

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Current Referral #: 00000
Referral Date: 00/00/0000

Last Updated on: Referral Status: OPEN

[Number of Times Referred: 2]

Generate PDF and Print Client Profile

Navigation Tabs: About Client, News Feed, **Activity**, My Work, History, Floater Action

Sub-Navigation Tabs: Status, Intakes, Assignments, **Contacts**

Activity Sub-Tabs: Visits, Interactions, **Progress Notes**, All

Filter By Reviewed: ALL

Info for Current Referral #: 00000. Date: 00/00/0000
Click Here To Hide Details

Date: 00/00/0000
Generate PDF and Print

Approved By: Last, First
Reviewed Status: REVIEWED
Approved On: Date: 00/00/0000
Outcome: COMPLETED
Show Details

Date: 00/00/0000
Generate PDF and Print

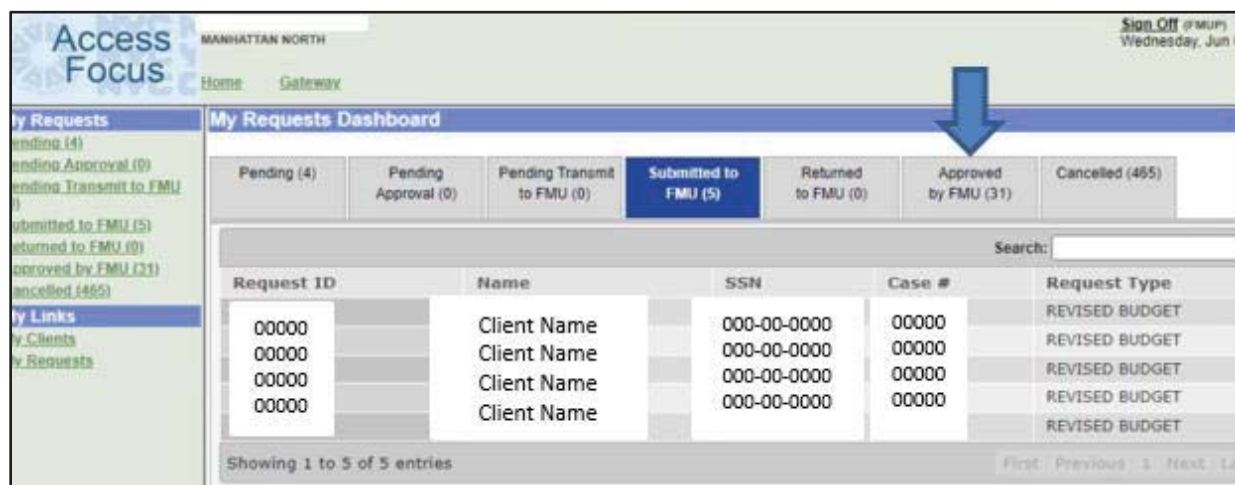
Approved By: Last, First
Reviewed Status: Reviewed
Approved On: Date: 00/00/0000
Outcome: COMPLETED

After discussion, the APS Director/Deputy Director must write a memo to FMS requesting authorization to issue benefits above \$500 to the client. The memo must include client ADLs discussed on page 2.

The APS Director/Deputy Director must:

1. Email the FIS authorization request memo by email to [HRA FMS](#).
2. Copy the APS Financial Management Liaison (FML) associated with the client's alpha group and the Caseworker on the email.
3. [Scan & index](#) the memo into HRA One Viewer.

FMS will advise the APS Director/Deputy Director via email if they approve the request. The Director/Deputy Director will then so advise the Caseworker. Staff can find any decisions about the client in the "Approved by FMU" tab, shown in the screenshot below.



The Caseworker must document the FMS approval or disapproval response into the APS_NET case notes, as shown in the screenshot on page 3.

Effective Immediately.