

## PROGRAM ORIGIN

Personal Affairs Management program was established in 1995

- Began as a bill paying program
- Initially funded through private and later public grant funding
- State ultimately adopted our model
- Initial staffing was coordinator, 10 hours per week

Personal Affairs Management program was designed to serve adults, ages 18 and over, who are elderly and/or disabled, with no appropriate friends or family to assist or care for them. PAM is a state wide program that serves residents without regard to race or religion.

## CHECKS & BALANCES

- Computerized check writing system
- Clinical team led by LPC, experienced Supervisors and Training Coordinator
- Quality Assurance Manager
- Professional Representative Payee for all government benefits led by Accounting Supervisor
- System validated during audits by DARS, Social Security Administration and independent accounting firm



## CASE CLOSING

Guardianship ends at time of death however the guardian may make funeral arrangements in absence of family.

Whenever sufficient funds available a pre-need funeral policy is purchased to be used by family at time of need.

The Conservator manages the estate until it is delivered to the Executor or other qualified person.

## CONTACT

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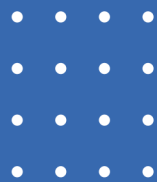
## JEWISH FAMILY SERVICE OF TIDEWATER

### PERSONAL AFFAIRS MANAGEMENT

Public and Private Guardian and Conservator Program



## LEVELS OF SERVICE



- Representative Payee – for PAM only
  - Appointed by the Social Security Administration to receive and manage the benefits of a recipient that has been determined by a physician to be incapable of managing these benefits
- Guardian/Conservator of Incapacitated Adult
  - Adult has been found by the court to be “incapable” of receiving and evaluating information effectively or responding to people, events or environments so as needing assistance and protection
- Guardian
  - Appointed by the court, responsible for making decisions regarding the person’s support, care, health, safety, rehabilitation, education, therapeutic treatment and residence
- Conservator
  - Appointed by the court, responsible for managing the estate and financial affairs of an incapacitated individual



## WHY AN AGENCY?

- Continuity of care
- Impartial third party
- Case Management services
- Multi-disciplinary team approach/Advisory Committee
- Internal Supervision
- Clear Policies and procedures



## FINANCIAL RESPONSIBILITIES

Services are provided by professional accounting staff with the assistance of screened, trained volunteers using technology

- Identify assets
- Sell or manage property
- Pay bills and taxes
- Account to the court
- Invest conserved funds

## SUBSTITUTE DECISION MAKER

- Medical decisions
- End of life decisions
- Property issues
- Professional Input
- Values history/client wishes
- Religious affiliation
- Input from family and friends
- Advisory Committee process
- Person centered substitute judgement



## PROGRAM REFERRAL SOURCES

### SOURCE

- Department of Social Services
- Hospitals
- Community Service Boards
- Attorneys, Physicians, Families

### ISSUE

- Abuse, neglect, self-neglect, exploitation
- Medical decisions, discharge plans
- Representative Payee needs
- Case management, Financial issues, mediation

## CASE MANAGEMENT STAFF

- Clinical Supervisor who are licensed clinicians
- Case managers with a minimum of Bachelors Degree or equivalent professional degree/experience in Social Work, Counseling, Education, Law Enforcement, Special Ed. Nursing, Divinity, Etc.

### Program Advisory Committee

- Physicians
- Mental Health Professionals
- Lawyers
- Clergy
- Accountants
- Business Professionals
- Social Services and Area Agencies on Aging

## ROLE OF CASE MANAGER



- Assess needs
- Plan care
- Coordinate services
  - in-home care, placement, Benefits, Medical, Financial, funeral, facility, etc.
- Consult/Collaborate with PAM team, Advisory Committee, family, property manager, clergy, facility staff
- Review needs/ keep accurate records