

# Case management role in supporting financial decision-making

## CORE RESPONSIBILITY:

These are things that must be done a certain way or at specific times.

- Ensure financial support needs are assessed.
- Facilitate financial decision making in a manner that reflects the person's choices and honors their perspective.
- Ensure the person's perspective is in all financial decisions.
- Describe financial supports in place to meet assessed needs in the ISP.
- If there is a financial plan, monitor the implementation of the financial plan and expenditures against that plan.
- Report suspected financial exploitation or abuse.
- Provide resources and referral, as needed.

**JUDGMENT AND CREATIVITY:** These things are important to do, but may be done in different ways and at different times according to the person's unique circumstances.

- Advocate for the person's financial rights.
- Assist in developing financial supports as need to meet assessed needs.
- Consider the person's full life trajectory and ensure that financial decision-making supports align with the person's long and short-term vision for their life.
- Offer services and resources to help meet financial support needs.
- Work with the person to figure out who else is in their life to assist with financial decision making and/or supports, including non-paid and natural supports.
- Look for opportunities when planning to build the person's financial skills.
  - Encourage the person to build financial skills. (Be prepared to take 'no' for an answer and don't force it.)
- Figure out when and how to connect the person/family with financial training, benefits counseling, etc.
- Follow a person-centered, supported decision-making approach by supporting the person to be self-determined in financial decisions that align with the person's values and interests.
- Engage the team – creative solutions might arise.

**NOT YOUR PAID RESPONSIBILITY:** These things are not part of your typical job duties.

- Be the final financial decision maker.
- Force financial supports.
- Be the Representative Payee.
- Decide if the person needs a Representative Payee. This is a decision made by Social Security Administration.
- Decide who will be the person's Representative Payee. This is a decision made by Social Security Administration.