

## PATHWAYS ABILITIES SOCIETY

### **PROCEDURE: PERSONAL AFFAIRS OF PERSONS SERVED**

**Applies to:** All Personnel, Volunteers, Persons Served, Families, Advocates and Caregivers

Original Effective Date: 1993

Effective Date: May 9, 2022

Replaces Procedure Dated: January 24, 2013

1. In the event an employee or volunteer is requested by individuals receiving services to:
  - Sign or witness any legal or medical documents, the employee and volunteer refers the individual to the manager or appropriate supervisor.
  - Handles or manages the person's monies or assets apart from the minimal personal need funds, or accept, for safekeeping, personal effects and jewelry, the employee or volunteer refers the individual to the manager or appropriate supervisor.
2. The supervisor or manager reviews the policy with the person and assists them to make the required arrangements to have the forms signed or money, personal effects, etc. managed.
3. Employees and volunteers must report to the executive director or supervisor any suspected situations of an individual's inability to handle their own finances, or of mismanagement of their finances by co-workers, relatives or friends.