

The Right Door for Hope, Recovery, and Wellness

Chapter Title	Chapter #		Subject #
Recipient Rights	RR		124.1
Subject Title	Adopted	Last Revised	Reviewed
<b>Residential Services: Person served Access to Money</b>	09/26/96	1/20/21	07/18/06 03/21/02 04/22/99; 3/29/10; 8/1/13; 1/4/17; 1/20/21; 1/14/22; 1/26/23; 1/19/24

## PROCEDURE

### Application

This procedure shall apply to all services operated by or under contract with The Right Door for Hope, Recovery, and Wellness. All funds and valuables of a person served shall be in compliance with the licensing rules for Adult Foster Care small group homes (R400.14315). Providers must pass site reviews performed by the Department of Health and Human Services related to AFC licensing requirements to The Right Door for Hope, Recovery, and Wellness. This procedure shall serve as a guide to assure compliance with Board policy regarding Recipient Rights.

#### 1.0 Upon Admission to Program

1.1 Agency employees or independent contractors and their employees, upon the admission of a person served to a residential services program, shall verbally and in writing explain to the person served (or legal representative when applicable) the following information:

- The residential program's general limitations regarding a resident's access to their money. The explanation shall include a verbal and written notice that individual limitations may be imposed under certain circumstances.
- That individual limitations regarding a resident's access to his/her money may be appealed either verbally or in writing to the Recipient Rights Officer.

1.2 Agency employees or independent contractors and their employees, upon the admission of a person served to the residential program, shall

- (1) inventory all money in the possession of the person served.
- (2) ensure that the person served signs and dates money inventory.

The Right Door for Hope, Recovery, and Wellness

Chapter Title	Chapter #		Subject #
Recipient Rights	RR		124.1
Subject Title	Adopted	Last Revised	Reviewed
<b>Residential Services: Person served Access to Money</b>	09/26/96	1/20/21	07/18/06 03/21/02 04/22/99; 3/29/10; 8/1/13; 1/4/17; 1/20/21; 1/14/22; 1/26/23; 1/19/24

- (3) provide a copy of the money inventory and a receipt to the person served, (or legal representative when applicable)
- (4) maintain the original money inventory and a copy of the receipt in the resident's record

**2.0 Money Inventory**

- 2.1 The agency staff or independent contractors and their staff shall inventory money of a person served that is to be held by the agency or independent contractor for safekeeping both at the time of admission and the time of discharge from a residential program.
- 2.2 The program shall keep the money inventory of a resident current and shall update it as changes occur (i.e., deposits, withdrawals, etc.)
- 2.3 The resident or legal representative, when appropriate, shall receive copies of the money inventory at the time of admission, quarterly, and at the time of discharge from the residential program or upon request.

**3.0 Limitations**

- 3.1 General limitations applicable to all persons served in a residential program shall be posted on bulletin boards and written in the program rules.
- 3.2 Individual limitations must be approved by the Person-Centered Planning Team and monitored by the Support Coordinator or designated person.
- 3.3 When access to money is individually limited, it shall be documented in the resident's Plan of Service and be included in the record. The documentation shall include:

The Right Door for Hope, Recovery, and Wellness

Chapter Title	Chapter #		Subject #
Recipient Rights	RR		124.1
Subject Title	Adopted	Last Revised	Reviewed
<b>Residential Services: Person served Access to Money</b>	09/26/96	1/20/21	07/18/06 03/21/02 04/22/99; 3/29/10; 8/1/13; 1/4/17; 1/20/21; 1/14/22; 1/26/23; 1/19/24

- justification of the limitation
- termination of the limitation
- review date of the limitation
- when and by whom the limitation was explained to the resident and, when applicable, to the legal representative

3.4 Individual limitations shall be removed when the circumstances, which justified its adoption, cease to exist.

**4.0 Documentation**

4.1 Agency employees or independent contractors and their employees shall

- (1) document in a resident's record the money inventory including instances of withdrawals, deposits, etc.
- (2) document any changes in the money inventory of a resident within twenty-four (24) hours of the change
- (1) submit to the resident (or legal representative and an individual chosen by the person served) a copy of the money inventory form on a quarterly basis from the time of admission
- (2) maintain the money inventory in the record of the resident

**5.0 Upon Discharge**

5.1 Agency employees or independent contractors and their employees, upon the discharge of the person served from the residential program, shall

The Right Door for Hope, Recovery, and Wellness

Chapter Title	Chapter #		Subject #
Recipient Rights	RR		124.1
Subject Title	Adopted	Last Revised	Reviewed
<b>Residential Services: Person served Access to Money</b>	09/26/96	1/20/21	07/18/06 03/21/02 04/22/99; 3/29/10; 8/1/13; 1/4/17; 1/20/21; 1/14/22; 1/26/23; 1/19/24

- (1) return all money which belongs to the resident/person served
- (2) submit a final copy of the money inventory to the person served (or legal representative, when applicable)
- (3) maintain the final money inventory in the record of the person served

**References**

Mental Health Code 330.1752  
Licensing Rules for Adult Foster Care Small Group Homes  
(R400.14315)

Kerry Possehn, Chief Executive Officer	Date		