



State of Connecticut
Department of Developmental Services

DDS

Ned Lamont
Governor

Jordan A. Scheff
Commissioner

Peter Mason
Deputy Commissioner

Memo

To: DDS Case Managers and Qualified Providers
From: Robert Smith, Program Manager, Case Management
Date: March 7, 2019
Re: Financial Assessment Documentation

The procedure for Personal Funds Financial Management by Qualified Providers was distributed September of 2017 and then had a minor revision in July of 2018. Within the procedure is the requirement for the responsible residential provider to determine by an assessment process the level of an individual's skill for management of his or her own personal funds. This financial management assessment shall be completed by the residential provider for each individual, reviewed and approved each year by the individual's Planning and Support Team, and attached to the individual's IP.

Providers can use whatever assessment they have been using or have developed since the implementation of this requirement.

Over the past several months, we have heard that some providers do not have an assessment tool and have asked for assistance in putting one together. The attached Financial Management Assessment can be used by those providers who do not have a tool of their own or decide to use this version. While it is a requirement that the responsible provider uses an assessment to determine an individual's ability to manage their finances, they are not limited to this attached tool.