

Row Label					
Dimension: Financial Exploitation	None	FE	FE	FE	FE
CELL Category	None	0- Inconsistent	1- No Problem or Treatment History	2 - Past Problems, No Current or Past Services	3 - Current Low/Moderate Problems, Not Receiving Services
CODE PIECES	None	(~A and ~B) and (D or E)	(~A and ~B) and (~D and ~E)	(~A and ~B) and (~D and ~E)	(~A and ~B) and (D or E)
Code					Any (F1-F10), but no (F11-F25).
Code Description			No indicators of financial exploitation	Indicator of previous financial exploitation (prior to 1 yr look back)	Indicator(s) of low/moderate financial exploitation
TEXT TO PRINT			<u>Service Recommendations for Client:</u> <ul style="list-style-type: none"> Develop or review plan of access to services and safety with [NAME] or what to do if Financial Exploitation occurs in the future. 	<u>Service Recommendations for Client:</u> <ul style="list-style-type: none"> Develop or review plan of access to services and safety with [NAME] or what to do if Financial Exploitation occurs in the future. 	<u>Service Recommendations for Client:</u> <ul style="list-style-type: none"> Report obvious incidents to law enforcement. Help client take immediate protective action on accounts by placing holds or restraints, e.g. stop or cancel all credit card transactions, bank withdrawals, change PIN. Report fraud to financial institution(s) immediately. Request changes of account holder, if appropriate. Obtain legal assistance. Refer client to representative payee services or legal guardian, as appropriate. Identify and contact family members, helpers, and other social support providers to identify appropriate money manager. <u>Service Recommendations for AA:</u> <ul style="list-style-type: none"> Coordinate AA services with any current AA service providers, such as probation officer, mental health professionals, substance abuse counselors, school/work officials. Discuss readiness to change with AA and any barriers to services. Discuss with AA what they need to improve their relationship with [NAME] . Ask the AA: "How ready are you right now to get help for the problems in your relationship with [Name]? 0%, 20%, 40%, 80%, 100%." Refer to Client Status Form [Alleged Abuser information], e.g. caregiver training, substance abuse treatment, anger management, respite care for older adult, adult daycare for the older adult. Refer AA to any money management services
Code Description					

FE	FE	FE	FE	Other Dimensional Treatment Planning Statements
4 - Current High Severity Problems, Not Receiving Services	5- Past Problem with Current Services	6- Low/Moderate Current Problem with Current Services	7- High Severity Current Problem with Current Treatment	Across Cells
C and -E	(A and -B) and E	(B and -C) and E	C and E	NA
Any (F11-F25).		Any (F1-F10), but no (F11-F25).	Any (F11-F25).	
Indicator(s) of severe financial exploitation	Indicator of previous financial exploitation (prior to 1 yr look back)	Indicator(s) of low/moderate financial exploitation	Indicator(s) of severe financial exploitation	
<p><u>Service Recommendations for Client:</u></p> <ul style="list-style-type: none"> • Report obvious incidents to law enforcement. • Help client take immediate protective action on accounts by placing holds or restraints, e.g. stop or cancel all credit card transactions, bank withdrawals, change PIN. • Report fraud to financial institution(s) immediately. • Request changes of account holder, if appropriate. • Obtain legal assistance. • Refer client to representative payee services or legal guardian, as appropriate. • Identify and contact family members, helpers, and other social support providers to identify appropriate money manager. <p><u>Service Recommendations for AA:</u></p> <ul style="list-style-type: none"> • Coordinate AA services with any current AA service providers, such as probation officer, mental health professionals, substance abuse counselors, school/work officials. • Discuss readiness to change with AA and any barriers to services. • Discuss with AA what they need to improve their relationship with [NAME]. • Ask the AA: "How ready are you right now to get help for the problems in your relationship with [Name]? 0%, 20%, 40%, 80%, 100%." • Refer to Client Status Form [Alleged Abuser information], e.g. caregiver training, substance abuse treatment, anger management, respite care for older adult, adult daycare for the older adult. 	<p><u>Service Recommendations for Client:</u></p> <ul style="list-style-type: none"> • Discuss past financial exploitation with [NAME]. • Review the need for financial services, barriers to accessing them, and any accommodations needed to participate in services (such as interference from alleged abuser, transportation, cost, etc.). • Develop or review plan of access to services and money security with [NAME] or what to do if these financial problems occur in the future. • Monitor for change in financial activities. • Obtain signed Release of Information (ROI) form from past financial services providers and request any service histories. • Review [NAME]'s compliance with past services, e.g. representative payee, family member, or legal guardian. <p><u>Service Recommendations for AA:</u></p> <ul style="list-style-type: none"> • Coordinate AA services with any current AA service providers, such as probation officer, mental health professionals, substance abuse counselors, school/work officials. • Discuss readiness to change with AA and any barriers to services. • Discuss with AA what they need to improve their relationship with [Name]. • Ask the AA: "How ready are you right now to get help for the problems in your relationship with [Name]? 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NOTE: This is a summary page, edit in Key or Code Pieces Summary				