

LOS LUNAS COMMUNITY PROGRAM

POLICY: FUNDS OF INDIVIDUALS SERVED

PURPOSE:

To insure that the funds of those individuals participating in the Los Lunas Community Program for which Los Lunas Community Program has fiduciary or advisory responsibility are properly used and accounted for in compliance with all applicable Federal and state laws, regulations, and procedures.

POLICY STATEMENT:

The Los Lunas Community Program will, through related procedures, take all steps required to protect the rights of Los Lunas Community Program individuals in regards to their personal funds and insure, wherever possible, that these funds are used for their benefit, personal needs, the enrichment of their emotional health and welfare, and as a means to foster independence and community integration.

GENERAL INFORMATION:

1. A community based Medicaid Waiver program such as the Los Lunas Community Program has, by design, only limited access to individual personal funds in keeping with its goals and objectives of promoting individual independence. The Los Lunas Community Program promotes a policy whereby the individual served will exert as much control over his/her personal funds as possible thereby limiting the Los Lunas Community Program's role to Federal and state required audits and counseling, as provided by the terms of their Individual Service Plan, in money management.
2. If the parent, guardian or legal representative wishes to sign checks written on the individual's account, he/she must be the Representative Payee for the individual.
3. All individuals of the Los Lunas Community Program for whom LLCPP is the Representative Payee will open and maintain personal checking accounts at a local financial institution. Appropriate Los Lunas Community Program staff members will help assist any individual needing assistance in this regard. Checks issued by individuals in the supported living program will require two signatures unless specified otherwise in the Individual Service Plan: the individual, the Coordinator assigned to the individual and/or the Community Living Manager.
 - a) If Los Lunas Community Program is the Representative Payee for the individual, one signature on the account must be that of the LLCPP Coordinator or the Community

Living Manager.

4. Only during a limited period following a individual's entry to the program and in those cases where a parent, guardian, or legal representative has requested in writing that the Los Lunas Community Program assume a fiduciary responsibility vis-à-vis a individual's personal funds, will the Los Lunas Community Program have access to and the concomitant responsibility of maintaining and preserving those funds and assuring that they are spent according to Federal and state rules and regulations. Nevertheless, the Los Lunas Community Program staff members at all times will be prepared to counsel, advise, and assist individuals in the proper management of their personal funds and provide assistance and support to home based supports providers in this regard.
5. The Los Lunas Community Program, specifically the Business Operations Office, the Coordinators, and the House Manager, will follow at all times the procedures established for the usage of the individual's funds for personal needs and the management of individual funds and individual fund accounting.
6. The Business Operations Office shall use generally accepted accounting principles in any audits or accounting regarding individual personal funds.