

SERVICE RECIPIENT FUNDS AND PERSONAL PROPERTY GUIDELINES

Merrick, Inc.

Intent: To ensure that guidelines are followed so that service recipients will retain the use and availability of their personal funds and property.

1. Employees must ensure the separation of client funds from any other funds of Merrick, Inc., and its employees.
2. Whenever assistance is needed with the safekeeping of service recipient funds and/or property, employees must have written authorization by the service recipient, their legal representative, and County Case Manager. Employees must document receipt and disbursement of the funds and property of the service recipient, and follow any restrictions identified in the Coordinated Service and Support Plan and the Coordinated Service and Support Plan Addendum.
3. During the service recipient's intake meeting prior to service initiation, and at the annual meeting, the Program Training & Resource Manager will query, document, and implement the preferences of the service recipient, their legal representative, and County Case Manager regarding the frequency of receiving statements that itemize receipts and disbursements of service recipient funds or property.
4. Merrick, Inc., employers are restricted to engage in any of the following actions:
 - Borrow money from any service recipient;
 - Purchase personal items with service recipient funds;
 - Sell merchandise to a service recipient or personal services to clients;
 - Require service recipients to purchase items from Merrick, Inc., or
 - Use service recipient funds in a manner that would violate section 256.04, or any other rules promulgated under this section.
5. Merrick, Inc., and/or its employees cannot accept power-of-attorney for any service recipient of Merrick for any purpose.
6. Upon death of the service recipient, Merrick, Inc., must immediately return all personal funds or personal property to the person's legal representative or an executor of their estate in exchange for an itemized receipt.
7. All incidents of lost or stolen property of service recipients will be investigated with results documented in a master file managed by the Program Directors.