

**GERIATRIC SERVICES
CAPACITY ASSESSMENT**

**DOMAIN 7 – FINANCIAL AND
LEGAL ISSUES**

ASSESSING YOUR RESULTS

Domain 7: Financial and Legal Issues

7.1 Financial and Environmental Support

QUESTION	RESPONSE (ALWAYS, USUALLY, SOMETIMES, RARELY, NEVER)	NOTES
7.1.1 Is the IDT aware of resources or resource points of contact to assist consumers with transportation that is not medically related?		
7.1.2 Is the IDT aware of resources or points of contact for resources to assist geriatric consumers with housing and utilities?		
7.1.3 Is the IDT aware of resources or points of contact to assist consumers with meals or nutritional supplements?		
7.1.4 Is the IDT aware of resources to assist older consumers with other services, supports, and incidentals that are generally not covered by Medicare, Medicaid, and other Home and Community Based Services (HCBS)?		
7.1.5 Is the IDT aware of condition-specific resources that may assist older consumers and their caregivers to meet their financial needs?		

7.2 Legal Issues

7.2.1 Guardianship and Incapacity Determination

QUESTION	RESPONSE (ALWAYS, USUALLY, SOMETIMES, RARELY, NEVER)	NOTES
7.2.1.1 Does the IDT understand the legal process for determining if a consumer is incapacitated and requesting the appointment of a guardian?		
7.2.1.1 Are there protocols in place to ensure continuity of care for the consumer in the event that a guardian is appointed?		

7.2.2 Ombudsman

QUESTION	RESPONSE (ALWAYS, USUALLY, SOMETIMES, RARELY, NEVER)	NOTES
7.2.2.1 Is the IDT able to help consumers connect with their ombudsman to resolve problems with their payer or long-term care facility?		

7.2.3 Advance Directives

QUESTION	RESPONSE (ALWAYS, USUALLY, SOMETIMES, RARELY, NEVER)	NOTES
7.2.3.1 Does IDT staff know whom to contact or refer the older consumer to, for assistance with a living will, durable power of attorney for health care, and/or durable power of attorney for mental health care?		
7.2.3.2 Does the IDT know how to assess the appropriate time to institute a living will, durable power of attorney for health care, or durable power of attorney for mental health care?		

7.2.4. Health Insurance Portability and Accountability Act

QUESTION	RESPONSE (ALWAYS, USUALLY, SOMETIMES, RARELY, NEVER)	NOTES
7.2.4.1 Are IDT staff knowledgeable about HIPAA Title II regulations regarding consumer PHI?		
7.2.4.2 Do IDT staff honor and facilitate the release of PHI to the consumer?		