

## USE OF CLIENT EVALUATION SCALES

The following two scales, **Sample Financial Management Scale** in ASM 253, and the **Sample Guardianship Scale** in ASM 254, are intended to help workers to assess a client's capabilities and also assist them in any decision regarding the appropriateness of different types of client management arrangements. The financial management scale evaluates the client's need for help in managing personal finances and business affairs. The guardianship scale evaluates the client's ability to understand, make and communicate essential decisions about his/her person in order to avoid endangerment.

The scales could also be useful to document how decisions were reached, for supervisory review purposes and for new worker on the job training.

## SCALE FOR EVALUATING FISCAL MANAGEMENT PROBLEMS

The **Sample Financial Management Scale** in ASM 253 can be used by the worker when assessing an individual case to determine if there is a need for a representative payee, power of attorney arrangement or a court appointed conservator. General guidelines for evaluating fiscal management problems can be found in ASM 205.

## INSTRUCTIONS

Questions 1 through 5 of the scale measure the cognitive ability of the client. Question 6 measures the client's physical ability and questions 7 and 8 measure the client's willingness. If a client is unwilling to accept assistance in managing his/her financial affairs then only a representative payee or a conservator should be considered since all other forms of financial management require client consent.

The three columns on the right side of the scale for questions 1 through 4 measure the degree of dysfunction present and also if training can be used to adequately correct the functional deficiency.

For questions 5 and 6 these columns measure if the client could adequately function if assisted and if assistance is available.

The **Sample Guardianship Scale** in ASM 254 can be used by the worker when assessing an individual case to determine if there is a need for a court appointed guardian or a temporary guardian. General guidelines on the use of arrangements for management of the person can be found in ASM 205.

The opening paragraph on the scale describes the only circumstances in which a worker should consider the use of a guardian or temporary guardian.

Questions 1 through 9 explore the client's capability to understand and communicate regarding decisions necessary for his/her safety and protection. The three columns on the right side of the scale measure the degree of dysfunction and the adequacy of assistance from others. If other persons can be found to assist then appointment of a guardian may not be necessary. However, if the information indicates the client's functioning is inadequate and there is no one to assist, then guardianship could be considered if the client is endangered.