



Best Practices when working with people who have dementia

By Meredith L. Williamson, JD

NW Estate Law, LLC

Why is it important?



1.

Seniors are more susceptible to duress.

Duress – putting pressure, threatening or coercion to get another person to act

Undue Influence - taking advantage of a position of power over another person which can invalidate one party's consent as they are unable to freely exercise their independent will.



IN 2016, OF THE 14,737 ALLEGATIONS OF ABUSE AND SELF-NEGLECT INVESTIGATED, 4,185 WERE SUBSTANTIATED



THERE WERE 12,270 ALLEGATIONS OF ABUSE INVESTIGATED.
3,634 WERE SUBSTANTIATED
2,678 INDIVIDUALS WERE FOUND TO HAVE BEEN ABUSED.



1117 SUBSTANTIATED FINANCIAL EXPLOITATION.



VULNERABLE OREGONIANS OVER AGE 65 OR ANY ADULT WITH A PHYSICAL DISABILITY ARE ELIGIBLE FOR COMMUNITY APS INVESTIGATIONS.

Community APS reports

What are the risks to you
and your business?



2.
Your
business
may be at
risk

**BBB in 2016 there were 3862
inquiries re: placement.**



Bad online reviews



Complaints to referral sources



Not using your services again

Insurance policy may not cover intentional or grossly negligent acts – some won't even cover negligent.

Negligent - The omission to do something which a reasonable person, guided by those considerations which ordinarily regulate the conduct of human affairs, would do. or doing something which a prudent and reasonable person would not do.

Grossly negligent - A severe degree of negligence taken as reckless disregard. Blatant indifference to one's legal duty, other's safety, or their rights are examples.

Intentional – Done with the intent

Civil penalties.

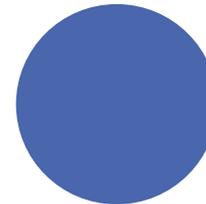
Litigation risk.

What are best practices?

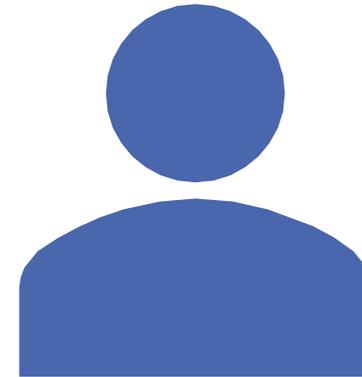




Determine who your client is.



The Person
Being
Placed?





Are they capable of making their own decisions?

If yes, the senior should be your client even if they did not initiate contact.

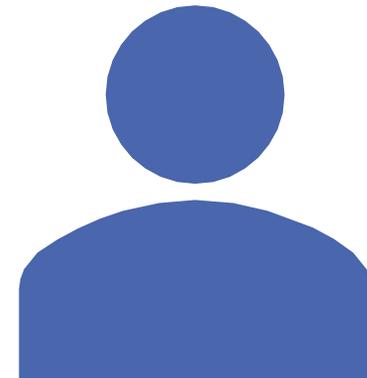
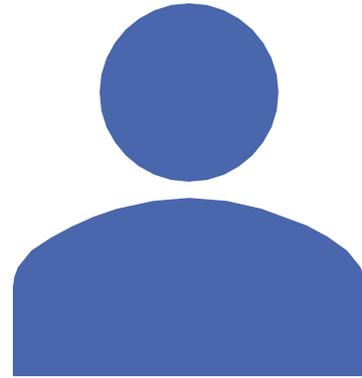


Are they willing to work with you?



Did they initiate contact?

The spouse
of the
senior?



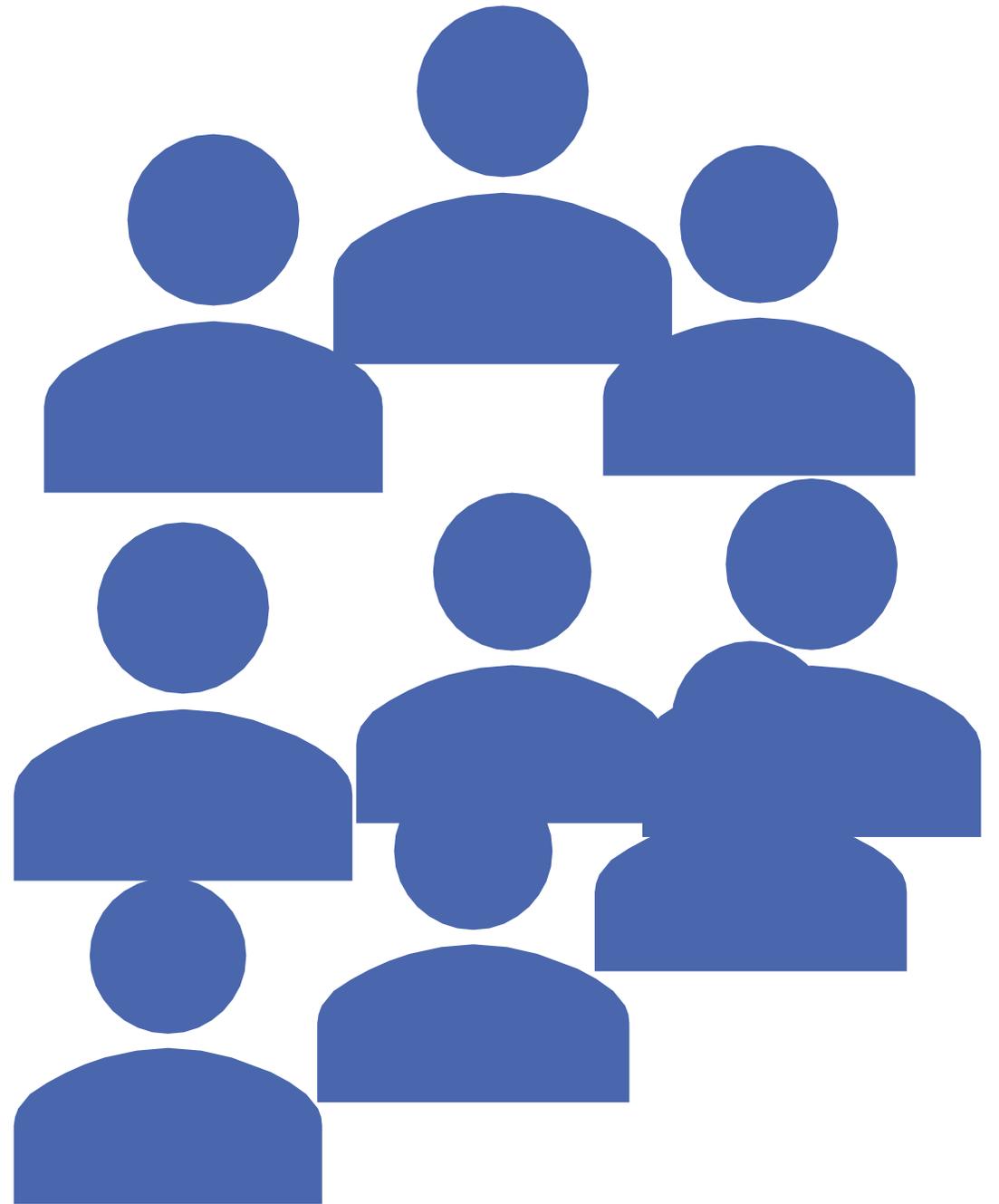
- Does the spouse have a power of attorney and advance directive?
- Other legal authority?

Is the person being moved not capable of their own decision but have a spouse that is?

Anyone else...?

- Adult child, neighbor, friend, brother, etc.
- Does that person have legal authority?
 - Power of Attorney
 - Advance Directive

Is the person being placed capable of signing themselves in and / or contracting with you.



What is legal authority?



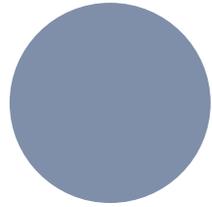
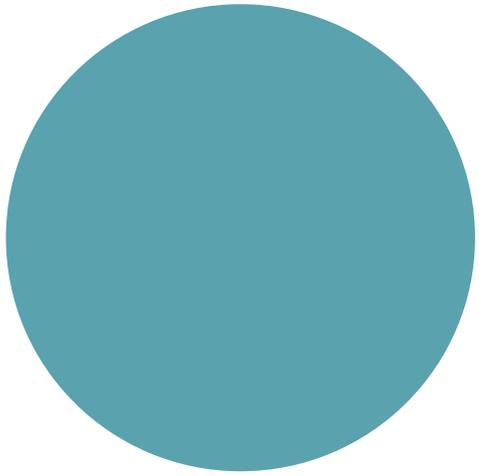
A right coupled with the power to do an act or order others to act.

Implied – not written but assumed due to the relationship - business relationship. Not generally husband and wife, not children.

Need a Power of Attorney for financial and Advance Directive for Medical

If nothing in place, may need conservator and guardian





Create policies and procedures
for your business.



Create a business model

1

Why do you do
this?

2

What are your
goals? Financial,
number of clients,
working hours.

3

Where do you see
yourself in five
years?

Create Company Guidelines



How many options will you provide a client –



How do you provide the options?



**What is your ideal turn around for a non-emergency?
What about an emergency client?**

Do you want to take emergency clients?
Can you handle the bandwidth if you do?



Are there certain clients you cannot help?

DD, mental health, out of area.

What is your policy for saying no or referring out?



Will you drive a client? Arrange for transportation?



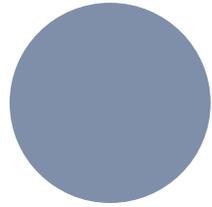
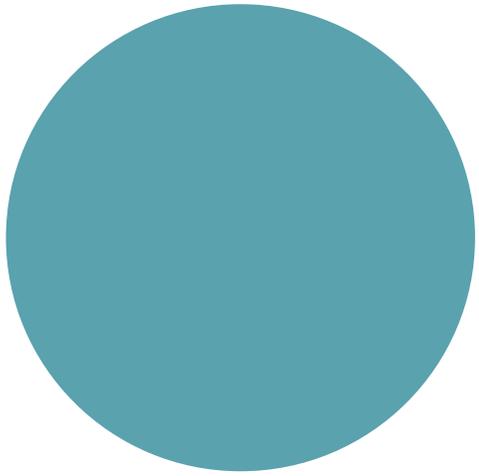
What do you not provide?

If you are cross referring, make sure the other agencies are compliant with the new legislation.

This is especially true if you are fee splitting.

You may want to also disclose the fee split to the consumer.

If you are fee splitting with an out of state company, they may need to be compliant.



Keep client files.

Paper or CRM

Client Files



Intake
information



Call logs



What you did
for the client



Date case
closed

Intake information



Medical needs



Financial needs



Location preferences



Other personal information relevant to the placement



Where the referral came from

Call logs



Who you spoke with



Date



Time



What did you discuss

What you did for the client



What places did you call and what result did you have?

Keep the list in the client file or CRM



What places you narrowed the list down to and why?



Where did the client move?

Make sure to keep this information with the client file and not just in billing so that you can easily cross reference.

Date case
closed



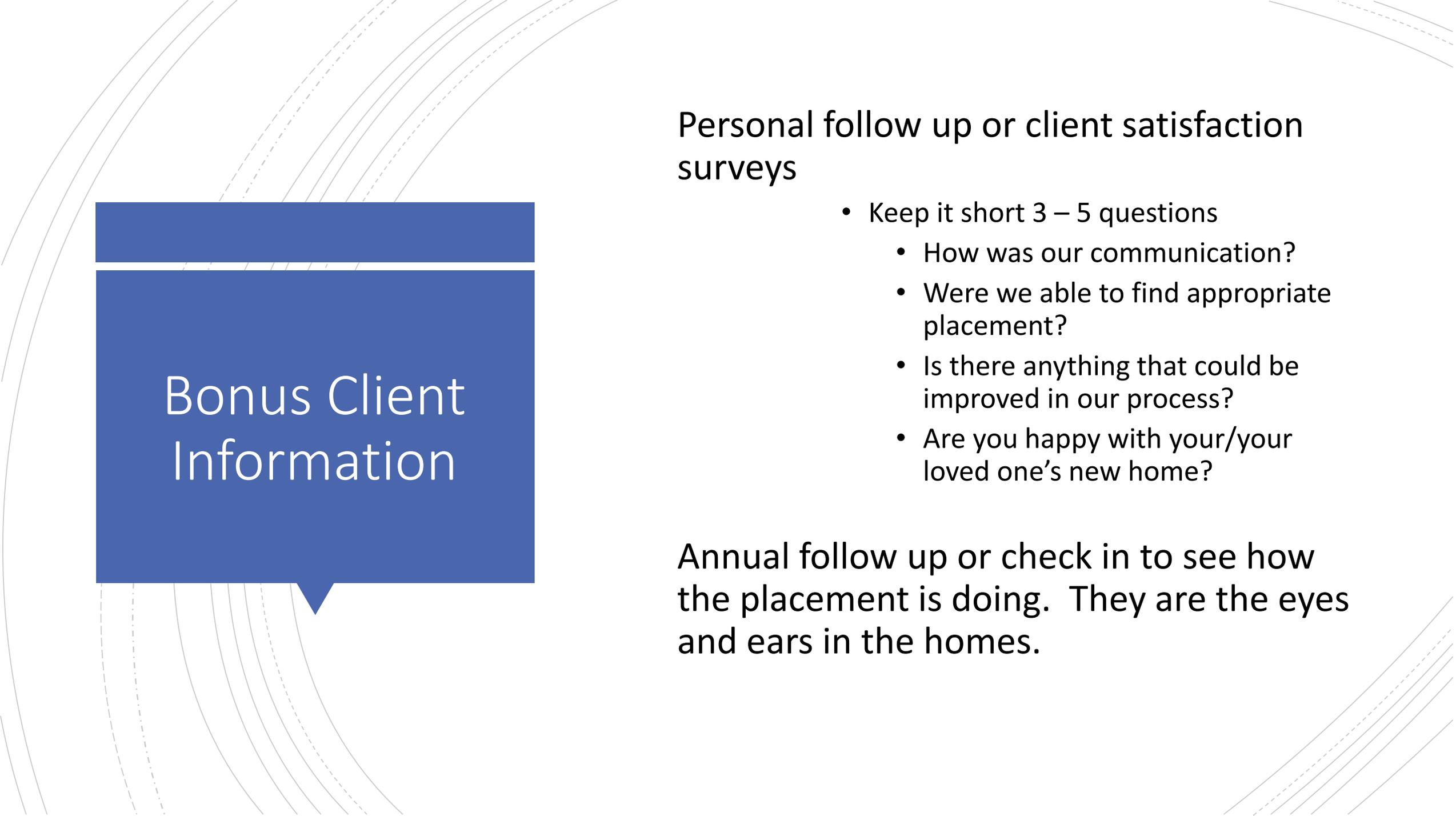
Did they move in?



If on hold...why?



Did they pick something not
recommend by you or not
billable by you?



Bonus Client Information

Personal follow up or client satisfaction surveys

- Keep it short 3 – 5 questions
 - How was our communication?
 - Were we able to find appropriate placement?
 - Is there anything that could be improved in our process?
 - Are you happy with your/your loved one's new home?

Annual follow up or check in to see how the placement is doing. They are the eyes and ears in the homes.

Other important information to note

- Did you refer them to other professionals? Keep notes on who and if possible, if they called those professionals.
 - Where they satisfied with those professionals?
- Was there something unusual about the placement that fell outside your norm. For example, they drove



Staff



- Keep forms or CRM that is consistent throughout company – don't let staff create their own forms (but allow them to provide input on yours).
 - Make sure your staff knows the process and expectation.
 - Have initial training sessions and annual reviews about the process.
 - If staff is not being consistent, find out why.
 - Is there something that needs to be improved in your policy or procedure?
 - Is staff just being complacent?

Why are notes important?



1

You will never remember all the details a year later.

2

Keeping notes at the time something happens will create the best record.

Why are policies important?



1

If a client or family member questions the placement, you can refer back to your policies and notes. Tough place to argue.

2

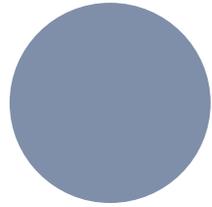
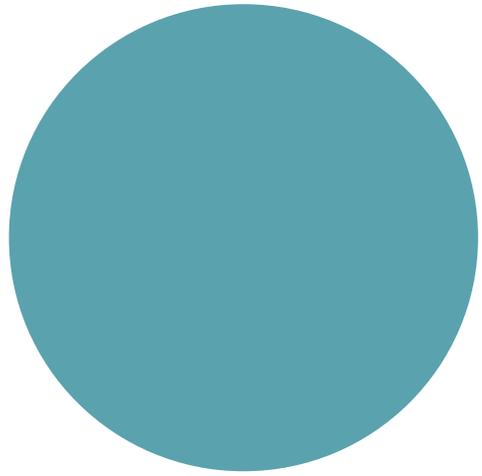
It is easier to remember the details (after reading your notes).

3

It is easier to remember something that was out of the ordinary.

4

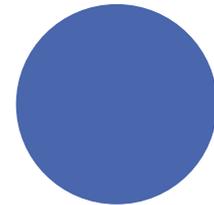
Growth. If policies are in place, they are simply followed by the next staff members added to your team. Training is easier



Take care of yourself.



Questions?



Thank You

