

Assessing a Person's Ability to Decide

In Matters of Financial Decision-Making

Adult Identified 

File (re)opened*

1



Initiation

Prepare or update file with background information including current circumstances, communications preference, family or support contacts. Inform adult about purpose & process. Book appointment.

2



Assessment

Reiterate purpose & process, confirm any support person, identify and collect collateral information, conduct assessment, indicate completion of test & update file.

3



Decision

Recommendation based on results from qualified health care provider & medical practitioner, notification to adult & support/family, response received, outcome processed & update file.

Reassessment required

File closed

*May be 1st time assessment or a re-assessment (including revoking existing CI)

- ✓ The procedural rights of every individual are respected.
- ✓ The process is conducted with administrative fairness.
- ✓ Information used throughout the process is current, accurate and within the context of financial and legal decision-making.
- ✓ All relevant information is considered in the decision to issue a certificate of incapability (e.g. both medical and functional assessments)

Guiding Principles

Role Expectations

Key Voices

Adult



Health Authorities



Director



PGT



Confirm understanding of process

Participate to best of their ability, beliefs and values

Respond to outcomes

Undertake process with assumption of capability

Explain process & meaning

Conduct transparently & respectfully

Document process clearly & provide information in timely manner

Check and confirm process undertaken with administrative fairness

Proceed only as process steps are completed in full

Recommendations based on facts

Keep adult from threat of risk

Flexibility for process that may be initiated by a variety of voices

Sharing necessary details for adult's file

Working with director to reach agreement on outcomes

Preparing client file according to outcome

Medical Practitioner



Complete standard assessment, paperwork & submits results to PGT