

FOOTHILLS GATEWAY, INC.

Restricted/Donated Funds Requests

PROCEDURE:

- Foothills Gateway, Inc. will review, approve, modify or deny all requests for restricted/donated funds made by/for any person who has case management through Foothills Gateway.
- Each restricted funds request must include the following:
 - A restricted funds request form.
 - An invoice showing the vendor, date of service, and dollar amount requested.
 - When purchasing equipment or requesting therapeutic classes, a letter of recommendation from a therapist and/or physician explaining how the item or class will therapeutically benefit the individual in service.
- Each request must be reviewed and initialed by the Case Manager's supervisor, and then forwarded to the Chief Operating Officer-Division of Case Management (COO-DCM) for approval.
- Preapproved requests can be requested for up to **3 months'** worth of ongoing services.
- All eligible program funding must be exhausted for the item/service requested prior to requesting restricted funds.
- The Case Manager or the family must attempt to access other funding outside Foothills Gateway, Inc. and document these attempts before the request for restricted/donated funds can be made. These efforts must be documented on the request form in the space provided.
- All restricted/donated funds requests for a \$1,000 or more must be reviewed by the Executive Team.
- If an individual is served by a Program Approved Service Agency (PASA) in HCB-DD waiver services, the Case Manager will request that the PASA pay half or contribute to the total amount. These requests will be decided on a case by case basis if the PASA is unable to contribute.
- No one individual may access more than \$1,000 total per fiscal year, or \$2000 per fiscal year for families with multiple eligible family members. This amount is not an entitlement and is not to be treated as an available "pool of funds". Each request will be tracked separately.

- **Items that will not receive funding:**
 - a) Vacations (except for “hopes & dreams”)
 - b) Vehicles
 - c) Mortgage
 - d) Utility bills, past bills

- Vehicle repairs, rent and/or security deposits will be determined on an individual basis.

- The COO-DCM will review all requests and determine the amount (if any) to be allocated. This may differ from the amount being requested. If approved, the completed form will be signed and submitted to the DCM Administrative Assistant who will email the Case Manager letting them know their request has been approved, complete a check request for the amount approved, and submit the original plus one copy to the Finance Department. If denied, the DCM Administrative Assistant will notify the Case Manager by email. The DCM Administrative Assistant will keep a copy as part of the tracking procedure.

- A tracking system will be maintained by the DCM Administrative Assistant to include a complete listing of all requests, amount of request, and funding source.

- A copy of the tracking list will be available upon request from the DCM Administrative Assistant to the COO-DCM.

- **Guardianship** - Prior to requesting restricted funds for guardianship, the family/guardian must attend a guardianship class/training. Guardianship Alliance and ARC of Larimer County provide these trainings. A certificate or letter of completion from the trainer, should be attached to the restricted fund request. The maximum amount requested for Guardianship is \$500.

- **Therapy Fund (HCBS-DD)** – Case Managers will need to follow restricted funds request guidelines for this fund. Funds are available for any person who has case management through Foothills Gateway, is requesting therapy funding for Massage, Music, Hippotherapy, etc., and is in the HCBS-DD/Comprehensive Services program. The maximum request amount will be \$500/fiscal year.

- **Hopes, Goals and Dreams Fund** – Case Managers will need to follow Restricted Funds request guidelines for this fund. Any person who has case management through Foothills Gateway is eligible. The hopes, goals and dreams must be mentioned in the Annual SP, and noted on the Restricted Funds request form. The maximum request amount will be \$500/fiscal year.

- **Emergency Supports, Respite/Housing** - Foothills Gateway, Inc. is often contacted about individuals with intellectual/developmental disabilities (IDD) who need emergency services/adult respite. Foothills Gateway may have donated funding available that could be used to help cover the cost of services, housing, and/or staff support for a person needing emergency supports, respite/housing.

Emergency Supports and Respite/Housing are not subject to the maximum \$1000 per fiscal year.

- **Transportation** - For bus pass requests, the DCM Administrative Assistant will create a Purchase Report and give to the Case Manager. The family/individual must provide their Case Manager with a receipt for the purchased bus pass. The Case Manager will attach the receipt to the Purchase Report, and submit the Purchase Report to the COO-DCM within two weeks after receiving the Purchase Report. The DCM Administrative Assistant will forward the receipt on to Finance for billing purposes.

9/00. . . . 4/19; 5/19; 9/19