

OANE Financial Decision Tracker (FDT) Risk Scores

Adult Protective Services Next Steps

NO CONCERNS – LOW RISK

Client does not demonstrate cognitive impairment

1. Use score as a baseline.
2. A release of information form must be signed before sharing the feedback with concerned family about the client's ability to make informed decisions.
3. Allow friends and family the opportunity to complete the FFI if concerns continue.
4. Consider if other services are needed to keep the client independent and living in the community.

SOME CONCERNS – MODERATE RISK

Client demonstrates a degree of impaired awareness, integrity or autonomy
This could be a temporary issue or the beginnings of a more serious deficit.

A complex issue could be more difficult for client to understand.

1. Explore decision in more detail
2. Complete FDT at a second visit.
3. Ask to speak to a trusted family or friend to complete the Friends and Family Interview (FFI)
4. A release of information form is needed to share the report with medical \providers.

MAJOR CONCERNS – HIGH RISK

Client with significant degree of impaired awareness, integrity or autonomy

1. Discuss threats and explore ways to protect the individual. Information on the FDT can be shared with the Judge, Prosecutor, law enforcement and GAL. Do not attach to a petition and request court file as restricted information.
2. Recommend a complete mental health evaluation to look at depression, anxiety, cognitive ability and substance abuse.
3. Recommend client postpone financial transitions
4. Share publications from the OANE resource page that discusses the components of informed decision making and the evidence base for the FDT found at Olderadultnestegg.com.