

Adult Protective Services

OANE Financial Decision Tracker (FDT) Decision Tree

Does this case involve any report of financial loss? Including:

- Proven loss of financial resources
- Alleged or possible loss of financial resources
- Future or continuing loss of financial resources

YES

NO

**Is the older adult their own decision maker
(e.g. does not have guardian or DPOA)?**

YES

STOP

FDT IS NOT
NEEDED

**Did the report of financial loss include any of the
following financial decisions?**

- Giving a gift
- Making a purchase
- Giving money to a scam
- Allowing someone else access to finances/money
- Having someone take over personal finances
- Other

YES

**Does the older adult appear to be a vulnerable adult?
Factors include:**

- Cognitive impairment
- Frail appearance
- Dependency/Unable to perform own activities of daily living (ADLs)
- Lack of control over own finances

YES

NO

Person may need protection.
Administer FDT

Person may need support for autonomy.
Administer FDT

**If a family member, friend or caregiver is available, also conduct:
Family & Friends Interview (FFI)**