

# Individual Budget Information

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1. Does this person have a single unified individual budget of public funds supporting him/her?

0=No (Go on to Item 2)

1=Yes (Skip to Item 6)

9=Don't Know (Go on to Item 2)

## IF THIS PERSON DOES NOT NOW HAVE AN INDIVIDUAL BUDGET:

2. About how much per year in public funds are spent for this person's residential supports?

\_\_\_\_\_ dollars per year (exclude SSI, SSDI, or other public assistance funds)

3. About how much per year does this person receive through SSI, SSDI, or other public assistance programs?

\_\_\_\_\_ dollars per year

4. About how much per year in public funds are spent for this person's day program, school, or employment?

\_\_\_\_\_ dollars per year

5. About how much per year in public funds are spent for other supports for this person?

\_\_\_\_\_ dollars per year

## SKIP THE REMAINDER OF THIS SECTION, IF THE PERSON DOES NOT NOW HAVE AN INDIVIDUAL BUDGET, AND THE ABOVE 4 ITEMS WERE ANSWERED.

## ANSWER THE FOLLOWING ITEMS ONLY IF THE PERSON CURRENTLY HAS AN INDIVIDUAL BUDGET.

6. About how long has this person had an individual budget?

\_\_\_\_\_ months

7. About how much is in the person's individual budget annually?

\_\_\_\_\_ dollars per year (leave blank if unknown)

8. Try to obtain rough estimates of how these individual budget funds are spent. If the person is living in a group situation, try to figure out how much this person's supports costs (often you simply divide by the number of people). Sometimes, this information simply won't be available on site. Make one attempt to get estimates, and if you can't, then leave this matrix blank and move on.

	8A. Housing (including rent, mortgage, utilities, food, household supplies, etc.)
	8B. Personal support in the home (staff, personal care attendants, home health aides, support coordinators, etc.)
	8C. Transportation of all kinds
	8D. Supported work, education tuition, adult day activity, community experience program
	8E. Therapies (psychological, physical, occupational)
	8F. Recreation, entertainment, vacations, buying leisure items such as televisions, stereos, exercise equipment, or luxuries

	8G. Other
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9. To what extent does this person (and/or circle) directly control the use of his/her individual budget?

- 1 Not at all
- 2 Advises a paid staff person, who also uses their own discretion as needed.
- 3 Advises a family member, who also uses their own discretion as needed.
- \_\_\_\_\_ 4 Has a guardian who makes these decisions.
- 5 Shares direct control over use of individual budget with another person
- 6 Has complete control over the use of their individual budget
- 9 Not applicable

10. In what ways does this person (with unpaid supports if needed) control his/her individual budget?

**0=No**

**1=Yes**

- \_\_\_\_\_ 10A. Took part in the original development of the budget
- \_\_\_\_\_ 10B. Keeps track of how budget is being spent
- \_\_\_\_\_ 10C. Decides how much personal assistance s/he wants each week.
- \_\_\_\_\_ 10D. Signs and/or authorizes payments to providers of supports.
- \_\_\_\_\_ 10E. Decides how their individual budget will be modified, with or without assistance.
- \_\_\_\_\_ 10F. Selects and/or directs a fiscal intermediary to distribute pay or other resources
- \_\_\_\_\_ 10G. Other (Specify, such as has a PASS approved, or other method of exercising control.)

11. Did the person choose whether or not he/she would control the individual budget? (Answer yes if the person received unpaid support to make this decision.)?

- 0 No
- \_\_\_\_\_ 1 Yes (by him/herself, OR with unpaid support if applicable)
- 9 Not Applicable

12. Does the person have a fiscal intermediary to assist in handling all or some of the individual budget?

- 0 No
- \_\_\_\_\_ 1 Yes
- 9 Don't Know

13. Did the person choose his/her fiscal intermediary?

- 1 No. Agency chose fiscal Intermediary.
- 2 No. Relative or guardian made this choice without input from the person.
- \_\_\_\_\_ 3 Partially, with help from paid agency staff
- 4 Partially, with help from unpaid relatives friends or guardians
- 5 Yes.
- 9 Not Applicable (Person is not capable of making this choice)

14. Please BRIEFLY describe who acts as fiscal intermediaries, and what function(s) they perform on the person's behalf., e.g., payroll for support personnel.