



## MONTANA STATE HOSPITAL POLICY AND PROCEDURE

### PATIENTS' ALLOCATED MONTHLY SPENDING ALLOWANCE

**Effective Date:** November 19, 2015

**Policy #:** TX-19

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**I. PURPOSE:** To provide guidelines for patients regarding utilization of their financial resources.

**II. POLICY:** Patients at Montana State Hospital (MSH) have a right to access and spend a reasonable sum of their own money while hospitalized. MSH will promote savings and financial management of personal funds to help patients develop spending plans similar to what they will experience in the community and savings that can be used upon discharge. Spending limits may be individualized and are based on income, discharge plans, and aftercare plan needs.

**III. DEFINITIONS:**

A. Discretionary:

1. Left to or regulated by one's own discretion or judgement.
2. Something that is to be used responsibly as needed.

**IV. RESPONSIBILITIES:**

- A. Social Workers – Secure information from patients, case managers, guardians, payees, and others in order to obtain an estimate of each patient's income and obligations upon admission. This information is shared with the patient and the hospital's reimbursement staff.
- B. Reimbursement Staff – Utilize the information provided by the patient and social worker to determine each patient's "discretionary income."
- C. Treatment Team – As part of normal discharge and aftercare planning will discuss with patient responsible spending and saving practices.
- D. Patients – Will plan with the treatment team for discharge and provide input into financial planning. The planning may include: target monthly spending allowance, monthly savings, discharge savings target, and monthly bills to pay. Patient questions regarding monthly spending allowance, savings targets, debt service or discretionary income will be referred to the patient's social worker.
- E. Patient Accounts – Provides a monthly statement to the patient and the patient's social worker detailing the balance in the patient's account and outstanding bills and payments due. The social worker will review this information with the patient to confirm projected utilization of resources. The information will be utilized to assist the patient and treatment team with drafting a personal budget including: monthly spending, savings, and payments on outstanding debts. The budget may also include a discharge saving target to assist the patient with transition back into the community.

