



NATIONAL ADULT PROTECTIVE
SERVICES ASSOCIATION

APS Administrators Webinar

Revised Standard Form for APS to

Request Bank Records

Thursday, January 7, 2016

Presented by:

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Today's Agenda

- Provide brief background on financial release document project
- Provide additional information received since release of these documents in 2015
- Discuss changes made to the documents
- Review the revised forms for requesting financial records
- Discuss these revisions and receive feedback from states
- Adjourn

Project Background

- Joint project between the Philadelphia Corporation for the Aging (Area Agency on Aging) and NAPSA
- Funding provided by the Huguetta Clark Family Fund for Protection of Elders
- Collaboration among multiple agencies representing various fields

Steering Committee

- Robert Anderson, Florida Department of Children & Families
- Dana Goldberg, SeniorLAW Center
- Judith Kozlowski, Administration for Community Living
- Alan Lawitz, New York State Office of Children and Family Services
- Ron Long, Wells Fargo Advisors
- Chuck Silverman, Beneficial Bank
- Jennifer Spoeri, Philadelphia Corporation for the Aging
- Nancy Warren, North Carolina Dept. of Health & Human Services

Purpose

- Project was intended to provide universal forms that any APS program could use (county or state) to request financial records
- Current forms and additional details located at www.napsa-now.org/banks
- NAPSA has received positive feedback on these forms, but there have been challenges

Revisions

- Revised documents are available under “handouts” in the GoToWebinar control panel as well as at www.napsa-now.org/banks
 - State statute citation added
 - Letter of introduction to local banks created
 - Follow-up letter to send to banks which have reviewed access asking for reconsideration

Success and Challenges Discussion

- For states that have used these forms or attempted to use them, what experiences have you had in regards to...
 - Success?
 - Challenges?

New Challenges

- What are some of the new/current challenges you are facing working with financial institutions?
- How else can NAPSA further assist with these challenges?

BRIEF (3 Questions) Survey to Collect Success and Challenges

- NAPSA would like to hear from you about your ongoing experiences with these documents
- You may visit www.surveymonkey.com/r/APSBankForm to tell us more
 - Demographic Info
 - Successes
 - Challenges
 - Comments

Thank You!

Please contact us for additional information!

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