Manitoulin-Sudbury District Services Board POLICY & PROCEDURES MANUAL	
Section: H. Ontario Works	Effective Date: July 2009
Topic: 3. Financial Assistance Eligibility	Replaces: November 2004
Subject: 3.3.Trusteeship	
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POLICY

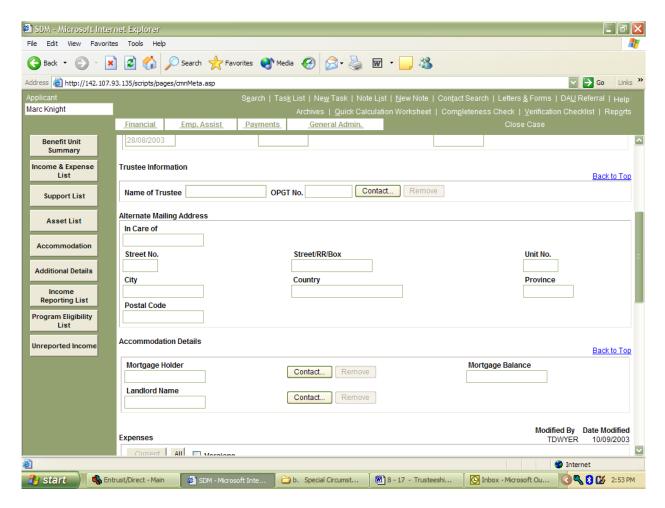
Authority OW Act: Sec. 17

OW Directives: Dir. 3.6

See Directive listed above.

PROCEDURE

Complete the trustee/alternate payee field in SDMT –Accommodation pageensuring that you have the correct spelling of the name and the correct address details.



Appointed trustees are required to sign the "Appointment of Trustee" form to acknowledge their understanding of the responsibilities of a trustee. A copy

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should be kept on file and one provided to the participant and trustee.

The trustee is required to provide an annual report accounting for the use of the basic financial assistance of the participant. Random audits of records may be made by the Case Manager on a monthly basis where warranted to ensure that the participant is receiving the benefit of the assistance.

Records must include:

- an ongoing list of all assistance and funds received by the participant, including the amount and date received; and
- an ongoing list of all monies paid out on behalf of the participant, including the amount, date, purpose of the payment and to whom it was paid.

At a minimum, all trustees should be automatically reviewed once every six months to:

- determine whether a trusteeship is still required;
- review the records of the expenditures to assess whether the assistance is being managed in the best interests of the participant and his or her benefit unit; and
- decide whether the trustee who has been appointed should be retained.

Cross Reference: Section 3.7 - Under 18