

C.J. - SW Case Manager Summary of Situation

C.J. lives in a one bedroom apartment at Wellspring Village. Her oldest son assists her with paying her bills and is her representative payee for her Social Security. However, she has difficulty meeting her monthly expenses simply because there is never enough money to meet her needs. C.J. has emotional and informal support from both her sons. When they can, her grandchildren assist her with house cleaning on weekends.

She appears to suffer from loneliness and depression. She suffered a stroke in the last year. She also has HTN, Allergies, CHF, arthritis, and significant pain from degenerative disc disease. She attends therapy for depression when she can.

She has a savings account with a balance of \$50.00. She does not have a burial plan, any other bank accounts, or assets. She has Medicare A, B, and D. She receives Social Security of \$754.00 and a pension of \$112.40.

Her rent is \$615 per month. Her water is included with the rent. She states she did not qualify for HUD sliding scale rent because she is \$1.00 over the income limit. Her son signed paperwork to assist with the rent, but due to a cut in his hours at work, he has been unable to do so.

This applicant has several urgent financial problems. She has received a cut-off notice from Duke Energy within the last 30 days. She was, however, able to pay \$100.00 toward her Duke Energy balance to keep her power turned on for another 30 days. Her current balance is now \$279.73 and she will likely face another cut-off notice next month.

Her phone bill currently has an overdue balance of \$137.58.

The client stated that when she does not have enough money to pay her monthly bills she and her son discuss what is most important. Last month she decided to allow her Cable to be cut off with an unpaid balance of \$108.88, so she could pay her electric bill. She also struggles with having enough money for nutritional food and for OTC medications (\$20.00) her doctor wants her to take for minor pains and allergies.

The SW completed the assessment and also completed the SA/IH Economic Assessment Worksheet, with C.J. They discussed all the issues above, as well as other monthly budget items. Reviewing C.J.'s monthly bills, the SW noted that her average electric bill is \$176.70, telephone is \$36.48, food costs average \$100.00, Rx co-pays are \$30.00. In addition to her expenses she is allowed a personal needs allowance of \$66.00.

She requires assistance with transportation and money management. She does not own a vehicle. She also needs some assistance with shopping, meal preparation, heavy house work, and setting up her medication boxes. CJ is at risk of placement due to her medical issues, limited income, and lack of consistent help from family.

(kg10/15)