OREGON STATE HOSPITAL

POLICY ATTACHMENT

PROCEDURES A:	Patient Benevolent Fund Request	**POLICY: 4.004**
POINT PERSON:	Director of Volunteer Services	
APPROVED:	Interim Superintendent	**DATE: JULY 25, 2024**
SELECT ONE:	○ New policy attachment ◉ Reaffirmation of existing policy attachment	○ Minor/technical revision of existing policy attachment ○ Major revision of existing policy attachment

RESPONSIBLE PERSON/GROUP	**PROCEDURES**
Interdisciplinary Treatment Team	Identify a patient financial need that may be appropriate for the Benevolent Fund (the Fund).
Social Worker	1. Determine, with the patient, whether there are any other resources, including personal funds on deposit at Accounting & Banking Services, which could be used in lieu of the Fund. a. Check the patient trust account for the past two or three months. Determine whether the patient has money, whether the requested expense was expected, etc. b. Determine whether the patient has the ability to repay the funds. c. Determine whether the patient has ability to contribute or acquire funds from family, has social security, has a representative payee, or has a conservator. d. Verify whether there are other OSH sources to fund the request. 2. If there are no other resources, complete the Benevolent Fund Form requesting funds. Include both the justification for the request (i.e., why the item requested is needed) and the search process for other resources. Include all supporting documentation. 3. If repayment is deemed appropriate, request the patient sign the form. Send the completed form to Volunteer Services.

	4. If the patient is to repay the Fund, complete the "Consent to Withdrawal of Funds from Patient Trust Fund Account" form with the patient. Include the completed form with the Benevolent Fund Request to show the monetary amount from the patient's trust account that is to be repaid to the Fund.
Fund Administrator	1. Review the submitted form and approve or deny the request. 2. If approved, route the form to Accounting & Banking Services
Accounting and Banking Services	1. Once the approved form is received, notify the person who completed the form and disperse funds. 2. If repayment has been arranged, prepare an invoice for the amount to repay.