

Keep'N It Real Solutions

VIRTUAL MENTAL WELLNESS



info@keepnitrealsolutions.ca

1-877-540-9870

keepnitrealsolutions.ca

Capacity Assessment Referral Form

Please Carefully Review The Following Before Proceeding:

Keep'N It Real Solutions has two designated capacity assessors with over 40 years of joined experience in the field who have been providing capacity assessments in Grande Prairie and surrounding areas for over 5 years.

Keep'N It Real Solutions assessors must come to the same agreement on the outcome which helps provide reassurance and best practice for your loved one or client. We also provide a full additional assessment in addition to the Capacity Assessment Form 4 to help show how we came to our clinical conclusions.

What is a Capacity Assessment and How Can it Help?

A capacity assessment is a tool used to evaluate if an adult is capable of making personal or financial decisions.

Capacity is the ability to understand information that is relevant to make a decision; and the ability to appreciate the reasonably foreseeable consequences of making or not making a decision.

A capacity assessment is not a medical diagnosis nor can it officially determine an adult's capacity, this is done by a judge in a court of law once the application and assessment for guardianship and/or trusteeship are submitted.

When Can a Capacity Assessment be done?

Capacity assessments can be requested for adults aged 18 and older or youth 6 months prior to their 18th birthday.

An assessment can be requested on behalf of an adult or the adult themselves; however, if the adult does not consent and refuses to take part in the capacity assessment, an individual must go through standard court proceedings and the request can be mandated by a court of law if it is felt that it is in the best interest of the adult. Alternatively, if the client is unable to consent (i.e. due to significant developmental delay, traumatic brain injury etc.) and it is in the best interest of the adult capacity assessments can proceed.

Process of Getting a Capacity Assessment Completed

A medical form must be completed prior to the interview or making a determination about capacity, indicating that the adult has not suffered any acute medical conditions in the past three months that may affect their capacity. This is a standard form and our agency can provide this to the adult's primary care physician prior to the assessment.

Costs Associated with Having a Capacity Assessment Completed



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There is a cost associated with completing a capacity assessment.

- The interview and research portion is \$250 CAD.
- If it is determined that a Capacity Assessment is the next step
 - \$500 for guardianship or trusteeship; \$700 for both
 - Additional administrative costs may be requested at \$75 CAD per hour if the assessment is complex and additional time is needed to provide counselling, consulting, or if continued attempts to reach the individual requesting the capacity assessment.
- Most if not all assessments are completed virtually. If an in-person assessment is required additional travel fees will be charged as follows:
 - \$65 CAD/ hour travel fee
 - \$0.55 CAD/ Km

Please note that AISH does not cover the cost of Capacity Assessments

As this is a medical expense done by a registered social worker you may be able to claim it and thus we encourage you to speak with your bookkeeper.

If this is a significant financial burden, please contact the office of the public guardian and trustee of Alberta to discuss options.

Assessment Details:

Please provide us the following, with as much detail and information as the referrer is aware.

I am requesting a capacity assessment for:

Guardianship:

- Health Care
- Accommodations; where, with whom, and under what conditions the adult
- is to live, either permanently or temporarily
- With whom the adult may associate
- Adult's participation in social activities
- Adult's participation in any educational, vocational or other training
- Adult's employment
- Carrying of any legal proceedings that **does not relate primarily to the financial matter** of the adult.
- Other not listed: Click or tap here to enter text.
- All the above

Trusteeship:

- Financial Matters: Any matter relating to buying, selling, managing, or protecting property. Essentially a financial matter refers to anything you can own (including money).



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Other:

- A capacity assessment for the purposes of enacting a Personal Directive or Enduring Power of Attorney (disclaimer: the assessment will not enact these documents as this is generally completed by a physician; however, it may give physicians additional documentation and a second opinion on whether to complete or not complete these forms).
- Disputing a current capacity assessment, guardianship or trusteeship order currently in place.
- Unsure (please explain): Click or tap here to enter text.

Information on Adult Requiring Capacity Assessment:

Name of Adult Requiring Assessment: Click or tap here to enter text.

Date of Birth (DD/MM/YY): Click or tap here to enter text.

Current Address: Click or tap here to enter text.

Phone Number: Click or tap here to enter text.

Is the adult aware of this request and consenting to this assessment (yes/no/unsure/incapable): Click or tap here to enter text.

Referring Person or Agency:

Name: Click or tap here to enter text.

Phone: Click or tap here to enter text.

Email: Click or tap here to enter text.

Reason for Capacity Assessment: Click or tap here to enter text.

Are there any current legal proceedings (yes/no): Click or tap here to enter text.

Does the adult have an enacted Enduring Power of Attorney, Personal Directive, or both: Click or tap here to enter text.

Has the adult undergone a capacity assessment in the past (yes/no): Click or tap here to enter text.

If you have please provide information on who completed it and when. You will also be asked to provide a copy of this before we perform our assessment.

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I can offer the following as additional information that would be relevant to making a decision about capacity (i.e. medical records pertinent to the assessment and current medication list, psychological or psychiatric assessments, school functional assessments, forensic assessments, bank statements, any previous capacity assessment etc.): [Click or tap here to enter text.](#)

Once completed we will mail your Capacity Assessment to the address below.

Name: _____

Address: _____

Phone Number: _____

Email: _____

We thank you for considering Keep'N It Real Solutions for your assessment needs.

Once the referral is completed and submitted we will get back to you as soon as possible.

Kindest Regards,

Malissa Veroni

MSW RSW
DCA (Alberta)
Cert. Human Rights Consultant
Cert. Anti- Human Trafficking Consultant
Hons. B.A Social Development Studies
Dip. General Social Work
Cert. Child Abuse Studies

Carrie Taks

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