

JAMES N. JARVIE COMMONWEAL SERVICE

CRITERIA,
POLICIES,
TRADITIONS
& METHODS

*for Beneficiaries of the
Jarvie Commonwealth Service
Visiting Program*

SUMMER 2002

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INTRODUCTION

The James N. Jarvie Commonweal Service (Jarvie or the Service) provides financial assistance and supportive services to elderly persons of the Protestant faith in the New York City area. The Service was founded in 1925 by James N. Jarvie and has provided assistance to over twenty-five hundred elderly individuals.

The essence of the Jarvie Commonweal Service is described in the 1934 Trust Agreement between the Jarvie Commonweal Fund and the Presbyterian Church:

“The aged needy have many problems and perplexities which their infirmities do not permit them to solve unaided. Once on our list, they become members of our family. We help them to live, not merely exist. We visit, aid and comfort them in sickness and in sorrow; we contact them with physician and minister, with clinic and hospital; we arrange and rearrange their budgets, advise as to housing and food...”

Faithful to its founder’s vision and to the “Jarvie Concept” underlying its establishment, the primary mission of the Jarvie Commonweal Service is:

“To offer financial aid and friendly service to elderly folk, sixty-five and beyond, within the Protestant faith and residing within the Greater New York area; persons of culture and education whose former comfortable circumstances have been reversed and who, in their declining years, find themselves without sufficient means of support.”

When individuals are referred to the Jarvie Commonweal Service, staff assesses their ability to perform the basic activities of daily living and their physical and psychosocial needs, as well as their assets, income, and expenses. The governing body of the Service, formally known as the Jarvie Commonweal Service Committee (The Committee), reviews the applications and assessments and can accept those individuals who meet the criteria for selection outlined in this brochure. The Jarvie Commonweal Service makes a lifetime commitment to aid and support the people it accepts as Beneficiaries, subject to their adherence to the policies and methods outlined herein.

SOME IMPORTANT THINGS TO KNOW ABOUT THE SERVICE

The Jarvie Commonweal Service does not publicize its program of financial aid widely and conducts its outreach quietly through a network of churches, organizations, and individual volunteers with whom it can maintain direct contact. This is important because the Service has always kept its relationship with its Beneficiaries confidential. Jarvie does not accept self referrals or referrals from family members, individuals or organizations with a financial interest in the situation.

The Jarvie Commonweal Service serves Protestants without discrimination based on race, color, national origin, gender, marital status, sexual orientation or creed. The Service expects that its staff and the individuals we serve will uphold this anti-discrimination policy.

Not all of the persons referred to the Service require financial assistance. Many individuals have sufficient financial resources to meet their needs, but because they have no family or anyone else in the immediate area to assist them on an ongoing basis, turn to Jarvie for a “listening ear” and supportive services. Like those needing financial assistance, these individuals become part of the Jarvie family as “Service Beneficiaries”. They receive a monthly visit in their home, telephone reassurance, and, when necessary, assistance with arranging for needed services. People who have financial resources, but have a need for supportive services, are welcomed just like those requiring financial assistance.

CRITERIA FOR SELECTION

A number of criteria govern the eligibility of persons to become Beneficiaries of the Service. The more significant of these are described on the pages that follow:

1. *Age 65 and Beyond*

Jarvie accepts as Beneficiaries persons 65 and over.

2. *Greater New York Area*

Jarvie accepts as Beneficiaries persons residing within a 50-mile radius of New York City (as measured from Columbus Circle)—the territory served by the Service.

3. *Protestant Faith*

Jarvie accepts as Beneficiaries and serves persons who are adherents of the Protestant faith.

4. *Former Comfortable Circumstances*

Jarvie accepts as grant receiving Beneficiaries persons whose previous “comfortable circumstances have been reversed”.

- There is no test of income or former affluence required. It is expected, however, that the applicant (and spouse) enjoyed a reasonable degree of material comfort, good health and relative financial security during their adult years, but are no longer self-supporting due to retirement, advancing age or some kind of loss, impairment or other misfortune.

5. *Culture and Education*

Jarvie accepts as Beneficiaries persons of “culture and education”. Although Jarvie is somewhat flexible in administering the broad standard of “culture and education” central to the original concept of the Service, the objective is to serve persons who are reasonably well educated with a fair degree of cultivation in matters of the mind and a developed appreciation for excellence in matters of taste, thought and conduct.

Thus, when persons are considered for the Service, they are asked to provide information about their background, including education, activities and interests. Below, activities and interests are outlined which will be considered as bearing on the

applicant's qualifications in the way of culture and education. Neither the presence nor absence of any particular element to any particular extent is necessarily conclusive.

- An applicant's educational background in all of its aspects is assessed qualitatively as well as in terms of formal educational attainment by way of courses of study and diplomas and degrees held. The level of educational achievement is viewed within each person's social and historical circumstances, and the focus is upon the totality of the knowledge, skill, competence and qualities of mind and character that have been gained by education of all kinds.
- One indicator of cultivation and education may be found in a person's professional or vocational activities, particularly those which consist of educating or training others as well as those which consist of creating art, literature, music and the like, and/or participating in the performing arts and other work requiring specialized education and/or knowledge of culture in any of its manifestations. Other vocational activities albeit of little significance in themselves may indicate a high level of learned ability.
- Obvious indicators of cultivation and training would include a personal history of active participation in or attendance at musical, dramatic, dance or visual arts productions and events. Other manifestations of cultural appreciation may include travel, facility in or appreciation of the language and literature of other societies, and the individual's viewing, listening and reading habits. We attempt to assess participation in and appreciation of cultural endeavors in the context of the applicant's cultural, ethnic and geographic background.
- A person's involvement in the church goes beyond church attendance, which is, of course, itself a significant cultural experience. Many of these activities, including serving in a leadership capacity as Deacon, Elder or Trustee; singing in the choir; playing the organ or piano for worship or other church musical activities; teaching Sunday School; leading or participating in Bible study; and other volunteer duties including participation in church sponsored service activities may involve significant elements of appreciation of culture values – Christian art, music, literature and the like. They may also offer significant evidence of educational attainment in Biblical scholarship, teaching and leadership skills among others. A careful examination of involvements in church-related activities is therefore often quite helpful in this regard.
- Involvement in community service and other “pro-bono” activities in an unpaid capacity may bear in a significant way on the quality of mind, skill, level and, in general, cultural and educational attainment that an individual may have achieved. Such involvements may go beyond those with a direct relation to cultural and educational matters and, in a sense, a personal history that demonstrates a selfless concern for others without expectation of reward is itself a indication of a degree of cultural and educational maturity. These involvements would include those related to:
 - Cultural and educational activities, such as involvement with museums, schools, parent/teacher associations, etc.

- Educational pursuits, such as involvement with an alumni-alumnae organization or professional society in an unpaid leadership position, committee assignment or other activity promoting the educational or cultural goals of the organization.
- Charitable groups, such as membership on the board of directors of a non-profit organization; volunteer work at a hospital, nursing home, etc. or other involvement in charitable organizations
- Service organizations, such as involvement with the homeless, youth, voter registration, inter-generational programs
- As in the case of “pro-bono” activities, an individual’s role as a parent or family member may, through the evidence of selfless dedication to the welfare of others, provide an indication of cultural and educational maturity. Thus, for example, parents sometimes sacrifice a dream or personal ambition to support one or more of their children or their relatives’ children, and encourage them to fulfill their own aspirations for higher education or cultural accomplishment. This may leave the parents without a high level of formal education, but may also indicate a value system that betokens a high standard of cultural and educational appreciation which has been fulfilled in the lives of others.

6. *Health and Safety Considerations*

Jarvie prefers in principle to accept those persons whose health at the time they apply is reasonably good considering their age. However, it will accept individuals with relatively minor and manageable health problems or disabilities, so long as they do not preclude their effective engagement with the Visiting Program, and they are able to live independently in the community.

- A person must be able to direct his or her own affairs and, prior to becoming a Beneficiary, must have executed a will, a health care proxy and a durable power of attorney. These documents include provision for the appointment of persons to administer their medical and financial affairs if and when they ever become incapacitated.
- A person requiring extensive health care or home attendant care or who is already in a nursing home or hospice at the time of application will generally not be considered.
- A person must, in Jarvie staff’s judgment, be able to relate positively and intelligently to the Jarvie Visitor at the time of application; persons with a guardian will not be considered.
- A person with a history of unresolved mental health, alcohol, or drug problems will only be considered if they remain actively engaged in mutually agreeable treatment(s) to resolve these problems.
- A person requiring “adult protective services,” that is, adults with serious mental and physical impairment(s) who are a danger to themselves or others at the time of referral will not be considered.

7. *Household Members*

Jarvie serves individuals and couples, and prefers in principle to accept only those persons with a spouse who is eligible to become a Beneficiary. However, it will accept individuals whose spouse or a dependent in the household is not eligible for service, so long as this person's presence does not preclude the effective conduct of the home visits and with the following additional understandings:

- The application will be reviewed carefully to determine whether the Jarvie financial assistance would largely be used to support the ineligible spouse or dependent.
- If the Beneficiary predeceases the ineligible party/parties, Jarvie's financial and other assistance will be discontinued and the surviving party referred to an appropriate agency.
- Persons with a spouse or dependent in their household with a serious mental health, alcohol, drug, or legal problem that poses a threat to the safety of the Beneficiary or would have an adverse impact on our ability to make home visits, will generally not be considered.

IMPORTANT JARVIE POLICIES AND METHODS

In considering candidates for membership in the "Jarvie family", it is important for all concerned to be aware of other Jarvie policies and methods pertinent to the admissions process and subsequent operation of the Service. Some of the more salient are outlined below and shown in more complete form in Appendix B at the end of this brochure.

1. *Admissions Process*

The admissions process involves a number of visits at the applicant's home, and contacts by members of the Jarvie Staff to determine his/her eligibility for the Service and how Jarvie may be able to assist them. With the permission of the applicant, Jarvie staff contact persons currently providing support and assistance to the applicant. A meeting with the Executive and Associate Directors of the Service is also required prior to the presentation of an applicant to The Committee for their approval.

- Applicants must be able and willing to cooperate in the verification of the information on their application.
- The Jarvie staff will endeavor to do this verification sensitively and discreetly, but must ask direct questions as to health, finances and other personal matters that the person may not be accustomed to discussing or may find embarrassing. Jarvie expects the applicant to provide candid and complete responses to the staff's inquiries.

- If financial assistance is sought, the Jarvie staff will expect to receive income tax records and bank records for the current and if necessary, prior years, as well as information about securities owned and documentation of other assets.
- If financial assistance is sought, the Jarvie staff will also expect to receive full information about major gifts to charity and significant asset transfers to relatives, and provisions of wills. Any financial or other assistance which comes to you from the Service is an outright gift for which nothing of monetary value is required in return.

2. *Financial Policies*

Staff of the Jarvie Commonwealth Service works collaboratively with applicants and Beneficiaries to complete their annual budget and update their financial records in order to ensure an accurate understanding of each individual's financial status and needs. Bearing in mind that Jarvie is committed to helping its Beneficiaries remain in their own home and communities, for as long as is feasible, we engage beneficiaries in a dialogue to establish a cost-sharing arrangement to maximize the use of their own resources for their support and care, to use public resources intelligently to enhance this care, and then to use Jarvie resources to supplement these resources.

- Each person's circumstances and financial situation are reviewed individually. An important aspect of cost-sharing is for Beneficiaries not only to use their Social Security, pensions and other income to meet their needs, but also to use their other financial assets, such as savings, stocks and bonds, and, if the individual owns an apartment, house or other real estate, to use the equity in it to meet these needs. Jarvie staff engages each Beneficiary in a dialogue to determine how the individual's assets, public resources, and Jarvie resources can be best utilized to meet her/his needs.

A. *Use of Beneficiary Resources*

- Jarvie expects a cooperative relationship and reciprocal concern on the part of Beneficiaries to manage their financial assets and conduct their economic affairs prudently. Therefore, we expect Beneficiaries to engage in an open and ongoing dialogue about their financial assets and about what is included in their annual budgets.
- Beneficiaries are expected to use their own assets, including cash, stocks, bonds, mutual funds, equity in real estate and any other significant assets to meet their needs until these resources reach a level of approximately \$20,000, before Jarvie will provide them with any significant financial assistance. In some cases, the spend down of assets below this level may be necessary to facilitate the receipt of public resources to help provide for an individual Beneficiary's need for care/assistance, such as home health care or nursing home care.
- If Beneficiaries own their home, apartment or other property, they are expected to use the equity invested in this property for their support and care, along with their other assets. Jarvie staff work collaboratively with Beneficiaries,

their families, and/or advisors to plan how the Beneficiaries can continue to live in their home, for as long as is feasible, and to assist them in identifying options such as taking out a home equity loan or reverse mortgage to help provide for their needs. Should home health care or out-of-home care become necessary, Jarvie staff work with Beneficiaries, their families, and/or advisors to coordinate the use of a combination of Beneficiary, public, and Jarvie resources to provide the care and support needed.

- Consistent with Jarvie policy that a person's assets should be used for their own support, residences, real estate and other significant assets are not to be transferred, gifted or preserved for the purpose of benefiting a Beneficiary's relatives, their church or other charity.
- If a Beneficiary receives an inheritance, gift or other financial "windfall," these resources must be spent on their needs. Additionally, a grant-receiving Beneficiary might temporarily shift to "Service Only" status while the "windfall" is utilized for the Beneficiary's needs.
- If out-of-home placement in an Assisted Living Facility is necessary, steps will be taken to aid Beneficiaries with placement in facilities of their choice that are located close to family and friends. However, only those facilities that provide comprehensive services at reasonable rates and/or facilities that accept Medicaid can be used when Jarvie grant funds are being provided to assist in meeting the Beneficiaries' needs.
- Similarly, when Nursing Home placement is necessary steps will be taken to aid Beneficiaries with placement in facilities of their choice that are located close to family and friends. However, only those facilities that accept Medicaid are to be used when Jarvie grant funds are being provided to assist in meeting the Beneficiaries' needs.

B. Use of Public Resources

- Jarvie expects that all Beneficiaries be enrolled in Medicare Part A, enrolled in Part B if financially practicable, or have some other means for accessing assistance in paying for their medical care.
- We expect all Jarvie Beneficiaries to take full advantage of all applicable public resources/benefits for which they are eligible including: public rent subsidy programs, prescription assistance programs, tax rebates, Medicaid and other miscellaneous programs that benefit individuals over the age of 65.
- When a person is released from a hospital and requires rehabilitation services, we require home care to be provided by a Medicare eligible provider and the services to be utilized to the fullest, until the benefit period is concluded.

C. Use of Jarvie Resources

- When an individual seeks financial assistance from Jarvie, the budgeting process begins with an open dialogue concerning her/his monthly and annual

expenses and income. This is an on-going dialogue. There is a more formal review once each year.

- For Beneficiaries who are able to manage their own financial affairs, Jarvie provides a monthly grant to cover agreed upon expenses that cannot be covered by the Beneficiaries' own resources.
- Jarvie provides financial support to Beneficiaries who need assistance with bill paying by making direct payments of rent, utilities and other expenses to the Beneficiaries' landlord, utility company or other vendors/providers.

3. *Service Plan*

The Jarvie staff works in collaboration with the individual and their family, as well as people in their support network (if so desired) and service providers to develop an individualized service plan to provide for the safety, security and well-being of each Beneficiary. In developing a mutually agreeable service plan, Beneficiaries and Jarvie staff will also outline how best to respond to an emergency in each individual's situation. Beneficiaries are expected to cooperate with Jarvie policies and methods, which are designed under Christian auspices with the best interests of the Beneficiaries in mind.

- As noted above, an applicant must provide a valid will before he/she is accepted as a Beneficiary as well as appropriate documents designating one or more persons to handle the person's medical and financial affairs should they become incapacitated. Beneficiaries are expected to update these documents as their circumstances change.
- Applicants must agree to be evaluated by a physician or other appropriate professionals before Jarvie accepts them and after they become Beneficiaries, if the Jarvie staff determines that this is necessary.
- Jarvie staff visits Beneficiaries in their homes on a monthly basis during regular business hours and the Beneficiary must be willing to cooperate in this process.
- A Beneficiary is expected to cooperate with Jarvie staff if it should determine that a referral for social, health or other services is needed.
- The Jarvie staff makes a great effort to carry out its work professionally, discreetly and with compassion, encouraging self-determination and respecting the dignity of the individual.

4. *Decisions About Care*

Throughout its history, Jarvie has sought to help Beneficiaries continue living in their own home or apartment as long as possible by providing social and/or financial support. Unhappily, there are limitations on Jarvie's ability to do this when it becomes apparent that remaining in the home is no longer functionally appropriate or safe for the individual.

- Although it is not feasible to predict what resources may be required to continue to maintain persons in their own home, the Service should not be expected to provide amounts of money to attain this objective after it becomes evident that this would greatly exceed what a caring family of moderate means would readily expend from its own resources for this purpose.
- Jarvie may condition its financial support on the willingness of the Beneficiary to transfer to a more appropriate setting if it becomes apparent that remaining in their home or other living situation is no longer safe or functionally or financially practical.
- Jarvie expects grant receiving Beneficiaries who qualify to apply for Medicaid or similar entitlements if home care or nursing home care becomes necessary and, regards this as an appropriate and necessary measure to provide assistance on a financially prudent basis.

5. *General*

Jarvie has a long history of faithful ministry to its Beneficiaries and seeks to continue this record of service. However, while Jarvie makes a commitment to provide financial and other support to its Beneficiaries on a life time basis without any charge, it does not make a legally binding commitment of support under any circumstances to a Beneficiary, nor does it commit to provide assistance in all events without any limitation, for her or his welfare and support.

- Beneficiaries are required to enter into a written agreement, which sets forth in definitive form in its entirety the nature of the relationship between the Service and the Beneficiary including the conditions of continued assistance from the Service. (Appendix A)

Beneficiaries are also provided with a Schedule outlining certain Policies and Methods of The Jarvie Visiting Service. The contents of the agreement and schedule are discussed with applicants in advance and they are given ample opportunity to consider it and discuss it with others. (Appendix B)

- The determination of the Jarvie Committee regarding the matters discussed in this brochure will be final.
- Any commitments made by the Jarvie Commonweal Service are not commitments of the Presbyterian Church (U.S.A.) or related organizations, including the Presbyterian Church (U.S.A.) Foundation.

Process of Application

As noted earlier, referrals are only accepted from Social Service Agencies, health care professionals, Ministers/Pastors from Protestant Churches and volunteers knowledgeable about the Service. To request a copy of the referral form and/or raise questions about eligibility, the referring person should call the office of the Executive Director of the Jarvie Commonweal Service at:

(212) 870-2967

or

email at jarvie@jarvie.org.

Completed referral forms should be submitted to:

Executive Director
Jarvie Commonweal Service
475 Riverside Drive, Suite 430
New York, New York 10115-0430

Appendices

Appendix A – Beneficiary Agreement

Appendix B - “Important Policies and Methods of The Jarvie Visiting Service”

Appendix C – General Agreement to Obtain and Share Confidential Information

Appendix A

**JAMES N. JARVIE COMMONWEAL SERVICE
475 Riverside Drive, New York, New York 10115**

AGREEMENT

Between _____

and

JAMES N. JARVIE COMMONWEAL SERVICE

This agreement states the terms and conditions upon which the James N. Jarvie Commonweal Service (the "Service") proposes to provide friendly service and assistance to you as one of its Beneficiaries.

The Nature of Any Grants and Services You Receive from the Service

The Service's financial support derives from an endowment, attributable to the dedicated generosity of the late James N. Jarvie, administered under the auspices of agencies of the Presbyterian Church (U.S.A.). The Service is viewed as a ministry of the Church and its services and financial assistance are provided without charge. However, the commitments of the Service are those of the Service alone and not of the Presbyterian Church (U.S.A.) or its related corporations, including the Presbyterian Church (U.S.A.) Foundation. If you receive a grant from the Service, it is not a lifetime annuity or pension but is subject from time to time to review and, in the absolute discretion of the Service, for or without cause to renewal, adjustment or termination. This is also true of any services you receive from the Service. Since any financial or other assistance which comes to you from the Service is an outright gift for which nothing of monetary value is required in return, it should not be treated by you as income for Federal, State and local tax purposes reported on your tax returns.

The Basis of Your Membership in the "Jarvie Family"

The Service considers friendly service to be as important as financial aid and whether or not financial assistance is provided, your acceptance into the "Jarvie Family" presupposes the creation and continuance of a long-term, friendly, cooperative and candid relationship of mutual trust and confidence between each Beneficiary and the Service's Visiting Staff.

To this end, if the Service is to continue its assistance, all Beneficiaries must comply in good faith with the policies and methods which are established from time to time by the Service. These policies and methods, which the Service endeavors to individualize to the extent practicable, are designed under Christian auspices and based on long experience in providing assistance to promote the well being of Beneficiaries. A summary of the more important of these policies and methods, and goals of the Visiting Staff, as presently in force, appears in the Schedule at the end of this Agreement. They are subject, of course, to modification over time as the Service may consider appropriate in the light of experience.

A Beneficiary who is unwilling to conform to the Service's policies and methods as they may be in effect from time to time may withdraw from contact with the Service without further obligation. Upon such withdrawal, or if in the judgment of the Service, a Beneficiary has not in good faith complied in a cooperative manner with the Service's policies and methods, the Service's financial and other assistance will be discontinued.

The Service recognizes that from time to time it may be in your best interest for the Service to pay an expense on your behalf for which you are entitled to reimbursement from an insurance company, entitlement program, or other responsible third party ("Reimbursement"). One reason that the Service might, in its discretion, choose to pay such an expense would be to expedite the provision of care or services to you.

By signing this Agreement, you as a Beneficiary of the Service agree as follows concerning expenses paid on your behalf by the Service for which you are entitled to Reimbursement.

1. If the Service, in its discretion, pays an expense on your behalf and you subsequently receive Reimbursement for that expense, then upon receipt of the Reimbursement, you will immediately pay the entire amount of the Reimbursement to the Service.
2. Your obligation to pay to the Service the entire amount of any Reimbursement that you receive for expenses paid for by the Service shall continue even if you have withdrawn from contact with the Service.
3. If, after your death, the executor/executrix of your estate receives Reimbursement for expenses paid for by the Service, it shall be the obligation of this person to pay the entire amount of the Reimbursement to the Service.
4. You hereby irrevocably assign to the Service the right to receive Reimbursement for any expenses paid by the Service on your behalf.

This Agreement states in its entirety the understanding between you and the Service relating to your status as a Beneficiary and may not be changed orally. If you are in agreement with the terms of this Agreement, please so indicate by signing in the space provided below.

Executive Director

Associate Director

Agreed to this _____ day of _____, _____

Signature of Beneficiary: _____

Appendix B

Important Policies and Methods of The Jarvie Visiting Service

A. *Some Conditions which Jarvie Beneficiaries Must Meet:*

1. Residence Reside within a fifty-mile radius of New York City – the territory of the Visiting Service.
2. Meeting Meet with your Visitor on a regular monthly basis in your home.
3. Health Permit the Service to discuss your health situation with doctors, nurses, or other providers and/or designated relatives or friends when the need arises.
4. Discretion Use discretion in discussing or publicizing your relationship with the Service with others such as acquaintances, members of your church and neighbors.
5. Candor Keep the Service informed at all times as to significant facts affecting your health, living arrangements and finances.
6. Budget Prepare realistic budgets in cooperation with Visiting Staff, based on all resources and obligations, that fulfill your needs without providing an immoderate or luxurious lifestyle.
7. Prudent Management Manage your affairs prudently and use your financial resources for your own care; refrain from transferring, gifting or preserving substantial assets for the benefit of others.
8. Will and Proxies Provide the Service with a Will, Durable Power of Attorney and Health Care Proxy and update these documents when your circumstances change.
9. Other Matters Comply with other policies and methods of the Service that are brought to your attention from time to time.

B. *Some of the Policies and Methods of the Visiting Program Staff:*

1. General Treat all Beneficiaries with dignity and respect for their individuality in a friendly, supportive and discreet manner reciprocating the trust and confidence of the Beneficiary.
2. Visitation Visit all Beneficiaries in their homes on a monthly basis during normal business hours.
3. Service Plan Assess the needs of each Beneficiary in a sensitive and understanding way and develop a mutually acceptable service plan to assist in promoting her or his well-being.
4. Services Assist in arranging and coordinating services to Beneficiaries, as needed.
5. Resources Be knowledgeable about the health, financial and other resources in the community.
6. Counsel Serve as a “listening ear” for Beneficiaries in times of trouble.
7. Guidance Explain the policies and methods of the Service to Beneficiaries and provide information about other services available to assist in meeting Beneficiary needs.
8. Finances Assist Beneficiaries in working and reworking their annual budgets and in addressing problems of financial management.

C. *Other Policies and Methods of the Visiting Program:*

1. Emergencies The Jarvie Service provides a “24 hour” answering service and on-call coverage to ensure staff availability to assist beneficiaries in emergency situations.
2. No Gifts Jarvie staff members may not accept gifts or gratuities from Beneficiaries.

Appendix C

James N. Jarvie Commonweal Service

475 Riverside Drive, Suite 430, New York, NY 10115

Telephone 212-870-2967

Fax 212-870-3229

GENERAL AGREEMENT BETWEEN

and the

James N. Jarvie Commonweal Service (“The Service”)

TO OBTAIN AND SHARE CONFIDENTIAL INFORMATION

I hereby authorize the James N. Jarvie Commonweal Service to obtain information from
and share information with _____ concerning

I understand that this information is necessary in order for “The Service” to _____

I understand that the Jarvie Commonweal Service, as a general rule, will maintain client
information as confidential, but it may be disclosed if Jarvie believes that it is in the best
interest of the Beneficiary to make the disclosure, or if Jarvie is compelled to do so.

(Beneficiary Name)

(Date)

(Representative of “The Service”)

(Date)

(Updated May 1, 2002)