

### X3.3D Identity Validation Interim State Process Flow (In-Person - Representative) – Level 3.0

#### ROLES & RESPONSIBILITY MATRIX

PROCESS STEP	Workers from Alberta Works Centres, ASC, PDD, Training Providers (Representative coming in-person)																								
<p>X3.3D.1 Follow current program practice to validate the Representative</p>	<ul style="list-style-type: none"> <li>• Follow current program practice to validate the Representative for who they say they are as well as to confirm the Legal Relationship with client to ensure they have the legal authority to Provide/Receive Client Information.</li> <li>• If the representative is representing a client from a different program area then yours, then inform the Representative to contact their Case Worker.</li> </ul> <p><i>NOTE: ASCC will follow their current practice in dealing with Representatives</i></p>																								
	<p style="text-align: center;">Information Sharing table once the Representative has been validated and their authority has also been validated</p> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th style="width: 12.5%;">Type of Information</th> <th style="width: 25%;">Definition</th> <th colspan="2" style="width: 15%;">Personal <small>(Example: Registration – tombstone and family unit)</small></th> <th colspan="2" style="width: 15%;">Financial <small>(Example: Income, Assets, Banking)</small></th> <th colspan="2" style="width: 15%;">General Case Management <small>(Example: Status, Caseworker, Benefits)</small></th> </tr> <tr> <th style="text-align: left;">Authority Type</th> <th></th> <th>Provide information to authority</th> <th>Collection Information From authority</th> <th>Provide information to authority</th> <th>Collection Information From authority</th> <th>Provide information to authority</th> <th>Collection Information From authority</th> </tr> </thead> <tbody> <tr> <td style="text-align: left; vertical-align: top;">Guardian - Private</td> <td style="text-align: left; vertical-align: top;"> <p>A guardian, appointed by the Court, has the legal responsibility to make decisions for an adult who lacks the capacity to make personal decisions.</p> <p>Depending upon the adult's needs, and areas where their capacity is lacking, this may include some but not necessarily all of the following areas: health care, where and with whom the adult can live, who the adult may associate with, social activities, educational or vocational training, employment, legal matters or any</p> </td> <td style="vertical-align: middle;">Yes</td> <td style="vertical-align: middle;">Yes</td> <td style="vertical-align: middle;">No</td> <td style="vertical-align: middle;">No</td> <td style="vertical-align: middle;">Yes</td> <td style="vertical-align: middle;">Yes</td> </tr> </tbody> </table>	Type of Information	Definition	Personal <small>(Example: Registration – tombstone and family unit)</small>		Financial <small>(Example: Income, Assets, Banking)</small>		General Case Management <small>(Example: Status, Caseworker, Benefits)</small>		Authority Type		Provide information to authority	Collection Information From authority	Provide information to authority	Collection Information From authority	Provide information to authority	Collection Information From authority	Guardian - Private	<p>A guardian, appointed by the Court, has the legal responsibility to make decisions for an adult who lacks the capacity to make personal decisions.</p> <p>Depending upon the adult's needs, and areas where their capacity is lacking, this may include some but not necessarily all of the following areas: health care, where and with whom the adult can live, who the adult may associate with, social activities, educational or vocational training, employment, legal matters or any</p>	Yes	Yes	No	No	Yes	Yes
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		<p>other personal matters the Court determines necessary.</p> <p>For example, if there are no concerns or important decisions anticipated regarding the adult's social activities, the Court may choose to not include that area in the guardianship order.</p> <p>The Court can also appoint a trustee to make decisions about financial matters. This person may be the same person as the guardian or may be a different person.</p> <p>The guardian has been granted legal authority to make decisions on behalf of the represented adult. The adult should be included, to whatever extent possible, by the guardian in the decision-making process.</p> <p>Guardians are expected to make decisions in the adult's best interests and according to their beliefs, values and wishes, if known.</p>						
	<p>Guardian - Office of the Public Guardian (OPG)</p>	<p>If no one (family member or friend) is willing or available to apply for guardianship, the Office of the Public Guardian can perform that role. The decision to grant a guardianship order is made by the Court.</p> <p><i>Same responsibilities as a Private Guardian</i></p>	Yes	Yes	No	No	Yes	Yes

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	<p>Private Trustee</p>	<p>It may be necessary for a trustee to be appointed by the court - this is sometimes called a Formal Trusteeship - for a person who does not have the capacity to make decisions with respect to financial matters. A trustee can be an individual or a trust company and this trustee is "entrusted" with the authority to manage the incapacitated person's money and property, and make expenditures that are reasonably required for the person's education, support and care.</p>	<p>Yes</p>	<p>Yes</p>	<p>Yes</p>	<p>Yes</p>	<p>No</p>	<p>No</p>
	<p>Trustee - Office of the Public Trustee (OPT)</p>	<p>The Public Trustee will inquire into an alleged need for a trustee and the court may appoint the Public Trustee to act as trustee if no other person is willing, able and suitable to act.</p> <p><i>Same responsibilities as a Private Trustee</i></p>	<p>Yes</p>	<p>Yes</p>	<p>Yes</p>	<p>Yes</p>	<p>Yes</p>	<p>Yes</p>
	<p>Supported Decision Maker (Supported decision making authorization)</p>	<p>If an adult has the capacity to make their own non-financial decisions but they would like some help, they can sign a form that authorizes someone they trust to be their "supporter".</p> <p>The adult can give their supporter legal permission to access relevant information that might otherwise be protected under privacy laws.</p> <p><i>This representative type is in the</i></p>	<p>Yes</p>	<p>Yes</p>	<p>No</p>	<p>No</p>	<p>Yes</p>	<p>Yes</p>

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		<i>Mobius code table as "Supporter"</i>							
	Co-decision maker	<p>A co-decision-maker (court ordered) can assist in making decisions in one or more of the following areas of authority: health care, where and with whom the adult can live, who the adult may associate with, social activities, education or vocational training, employment, legal matters or any other personal matters the Court determines necessary. Co-decision-makers cannot make decisions on financial and property matters.</p> <p>With co-decision-making, the adult and their co-decision-maker make decisions together. The decisions are made in the best interests of the assisted adult. The adult must agree to the arrangement and to the person who is appointed as their co-decision-maker.</p> <p>A co-decision-making order is appropriate for family and close friends.</p> <p>A co-decision-maker can assist the adult in communicating or carrying out decisions, when necessary or appropriate. For example, when making a health care decision, both the adult and their co-decision-maker would sign the form providing consent</p>	Yes	Yes	No	No	Yes	Yes	

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		for a procedure.						
	Power of Attorney (Power of Attorney Act – When PA is properly enacted)	An Enduring Power of Attorney is an important legal document you can use to appoint someone to make financial and legal decisions on your behalf. If you are the one passing the authority to someone else you are called the donor. The person you pass the authority to is called the attorney. A Power of Attorney is "enduring" because its power continues after the donor becomes mentally incapacitated or it can take effect after the donor becomes mentally incapacitated.	Yes	Yes	Yes	Yes	No	No
	Parent/ Legal Guardian of a dependent child (as part of FSCD)	This is the parent or legal guardian of a child under the age of 18	Yes	Yes	Yes	Yes	Yes	Yes
	Spouse (as part of Income Support)	A married couple or common-law partner or any couple who are cohabiting and have a relationship according to the Adult Interdependent Relationships Act. We would only share information with the 2nd signer on the declaration which states "spouse/partner".	Yes	Yes	Yes	Yes	Yes	Yes
	•							