

**Manitoulin-Sudbury District Services Board  
POLICY & PROCEDURES MANUAL**

Section: H. Ontario Works	Effective Date: July 2009
Topic: 3. Financial Assistance Eligibility	Replaces: November 2004
Subject: 3.3.Trusteeship	
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**POLICY**

**Authority**                      **OW Act: Sec. 17**  
   **OW Directives: Dir. 3.6**

See Directive listed above.

**PROCEDURE**

Complete the trustee/alternate payee field in SDMT –Accommodation page-ensuring that you have the correct spelling of the name and the correct address details.

The screenshot shows the SDMT web application in Microsoft Internet Explorer. The browser address bar shows the URL: http://142.107.93.135/scripts/pages/cmnMeta.asp. The application interface includes a navigation menu with options like 'Applicant', 'Search', 'Task List', 'New Task', 'Note List', 'New Note', 'Contact Search', 'Letters & Forms', 'DAU Referral', 'Help', 'Archives', 'Quick Calculation Worksheet', 'Completeness Check', 'Verification Checklist', 'Reports', and 'Close Case'. The applicant's name is 'Marc Knight'. The 'Financial' tab is selected. The 'Trustee Information' section contains fields for 'Name of Trustee', 'OPGT No.', and buttons for 'Contact...' and 'Remove'. The 'Alternate Mailing Address' section includes fields for 'In Care of', 'Street No.', 'Street/RR/Box', 'Unit No.', 'City', 'Country', 'Province', and 'Postal Code'. The 'Accommodation Details' section has fields for 'Mortgage Holder', 'Landlord Name', and 'Mortgage Balance', each with 'Contact...' and 'Remove' buttons. At the bottom right, it shows 'Modified By: TDWYER' and 'Date Modified: 10/09/2003'. The Windows taskbar at the bottom shows the start button and several open applications including 'Entrust/Direct - Main', 'SDM - Microsoft Inte...', 'b. Special Circumst...', '8 - 17 - Trusteeshi...', and 'Inbox - Microsoft Ou...'. The system clock shows 2:53 PM.

Appointed trustees are required to sign the “Appointment of Trustee” form to acknowledge their understanding of the responsibilities of a trustee. A copy

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should be kept on file and one provided to the participant and trustee.

The trustee is required to provide an annual report accounting for the use of the basic financial assistance of the participant. Random audits of records may be made by the Case Manager on a monthly basis where warranted to ensure that the participant is receiving the benefit of the assistance.

Records must include:

- an ongoing list of all assistance and funds received by the participant, including the amount and date received; and
- an ongoing list of all monies paid out on behalf of the participant, including the amount, date, purpose of the payment and to whom it was paid.

At a minimum, all trustees should be automatically reviewed once every six months to:

- determine whether a trusteehip is still required;
- review the records of the expenditures to assess whether the assistance is being managed in the best interests of the participant and his or her benefit unit; and
- decide whether the trustee who has been appointed should be retained.

**CROSS REFERENCE: SECTION 3.7 - Under 18**