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10 Mayflower Street, Duxbury MA, 02332 781-934-5774 x 5700

**FINANCIAL TRANSACTION RELEASE FORM**

The Executive Office of Elder Affairs has issued the following requirements with respect to direct service workers (DSWs) and money handling. DSWs are necessary for grocery and pharmacy shopping.

**A Senior Center Staff Member (serving as a DSW) who provides shopping for me must follow these procedures:**

* A DSW must provide me with a written receipt for any transaction.
* A DSW may use EBT card (Electronic Benefit Transfer).
* In respects to grocery shopping, a DSW may use a check pre-written by me, written out with the name of the specific grocery store and pre-signed by me. The amount that the DSW writes in the store, must agree with the receipt.

**I understand that my DSW:**

* May NOT reconcile or balance my checkbook
* May NOT cash checks for me.
* May NOT use my Bank Cards or ATM (Automated Teller Machine).
* May NOT provide other banking services.

The purpose of this form is to protect staff members from any type of situation surrounding financial harm or exploitation.

By my signature, I understand and agree to these procedures for financial transactions.

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| Signature of Staff Member/Volunteer |  | Date |