

# Instructions for Use

## Department of Health and Human Services

### Supervised Apartment Living (SAL) Budget Plan

This form is the intended for use by the SAL contractors beginning with SFY24

#### General Principles of Use:

- 1 Guidance and support for a child in SAL to develop life skills - including budgeting skills - is a SAL contract requirement
- 2 Assistance must be provided to each youth in SAL to develop individualized budgets so that youth may understand their fiscal obligations and learn to pay their own bills, shop for food, afford needed transportation, etc.
- 3 The Contractor shall assist each youth in SAL to develop a budget based on the monthly stipend and other income that may be available
- 4 Contractors shall assure that SAL living arrangements are reasonably priced to fit within each youth's budget
- 5 For the Cluster setting the Contractor shall not use more than 30% of a youth's monthly stipend for rent or any living expenses
- 6 For the Scattered setting that is owned by the Contractor no more than 30% of the youth's monthly stipend may go to the Contractor for rent and/or living expenses
- 7 For the Scattered setting that is not owned by the Contractor the Contractor shall not use any of the Child's SAL Stipend
- 8 For both Cluster and Scattered sites, the Agency maintains the right to reject any expenditure that it does not consider rent and/or living expenses
- 9 Contractors shall assure that each youth receives the monthly SAL stipend and, if needed, the start-up allowance from the Agency
- 10 Contractors shall provide assistance to each youth to open bank accounts and make monthly deposits into a saving's account - the amount to be deposited shall be identified in the youth's budget
- 11 Assist the youth to reconcile and update their budget monthly
- 12 Contractors shall maintain monthly documentation about each child's budget and the documentation shall be available to the Agency and Referral Worker upon request
- 13 A detailed record of all financial transactions including, but not limited to, all deposits and withdrawals shall be maintained by the Contractor
- 14 Contractors shall assure that each youth has full access to all their accounts when they exit SAL

#### The Budget Plan

- 1 Provide guidance to the SAL youth to complete the identifying information at the head of the form and throughout this budget - the "SAL placement" is a drop-down selection
- 2 The youth must enter all anticipated income - a couple of examples are included already
- 3 Anticipated Expense categories are broken down into two types: Costs considered *Essential* and costs considered *Non-Essential*
- 4 The dollar amounts in this sample budget are made up for the purposes of illustration and do not suggest what these may really be - the dollar amounts should be removed and all example entries reverted to zero before the youth will complete this budget
- 5 Please do not alter the unprotected cells that contain formulae unless necessary - those will automatically revert to zero when other example entries are removed before first use
- 6 Cells that contain hidden comments are identified by a colored dot in the upper right corner - users shall read these and follow instructions that may be provided there
- 7 Examples of Essential and Non-Essential Costs are provided - these may be adjusted as needed but once identified they should remain somewhat consistent from month to month
- 8 Additional Rows may be inserted as needed between the existing Rows that currently say "Other (Specify) - Please be careful to not over-write or displace existing formulas
- 9 The last section titled Savings should be used by the youth to simply keep an accounting on this one page of the status of each of their accounts

<b>SUPERVISED APARTMENT LIVING BUDGET PLAN</b>	
Name:	select SAL placement
Budget Plan Month and Year:	
<b>Anticipated Income</b>	
SAL Stipend:	
Job	
Other (specify):	
Other (specify):	
Other (specify):	
<b>Total Income (A)</b>	<b>\$ -</b>
<b>Anticipated Expenses</b>	
<b>Essentials</b>	
Rent:	
Utilities (water, gas, electric):	
Telephone/Cell Phone:	
Groceries (cash, not food stamps):	
Non-food Needs (e.g. deodorant, shampoo, etc.):	
Laundry:	
Transportation:	
Needed Clothing:	
Deposit to Savings Acct.:	
Other (specify):	
Other (specify):	
Other (specify):	
<b>B-Total Essentials Expense</b>	<b>\$ -</b>
<b>C-Amount Remaining (A-B)</b>	<b>\$ -</b>
<b>Non-Essentials</b>	
Entertainment (movies/eating out, etc):	
Other (specify):	
<b>D-Total Non-Essentials Expense</b>	<b>\$ -</b>
<b>Total Amount Remaining From Monthly Income (C-D)</b>	<b>\$ -</b>
<b>Savings</b>	
Savings Account Balance at Beginning of Month	
Savings this month:	
<b>Savings Balance</b>	<b>\$ -</b>
<b>Checking</b>	
<b>Checking Acct Balance at Beginning of Month:</b>	

Child Signature/Date Signed: \_\_\_\_\_