

# Financial Monitoring and Independent Assistance at Bridgewell

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### HealthCare Studies

#### Introduction

Bridgewell's mission is to empower people with disabilities and other obstacles in life so they can reach their greatest potential. They see a society in which everyone, in spite of their individual circumstances and challenges, can live happy lives, engage in their communities, and accomplish their objectives. Dedicated to promoting inclusion and dismantling barriers, Bridgewell is renowned for its dynamic and inventive approach. It provides comprehensive support services to people and communities in need including:

- Residential Support: Provide a variety of housing alternatives that are customized to meet the requirements of people with disabilities, including safe and supportive homes.
- Day Programs: To foster independence and self-assurance, their day programs provide education, skill development, and vocational training.
- Employment Services: By helping people find jobs, they promote financial independence.
- Clinical and Behavioral Health treatments: To promote mental and emotional health, they provide a range of clinical treatments.
- Participation in the Community: They actively participate in the community, forming alliances and advancing social inclusion.



#### Related Literature

52.0% of people with disabilities struggled to cover their regular household expenses during the Delta and first Omicron waves of the pandemic, according to data from the Household Pulse Survey. During the pandemic, people with disabilities were 2.78 times more likely than non-disabled people to experience financial hardship (Friedman, 2022).

Persons with disabilities experience frequent mental anguish at a rate that is 4.6 times higher than that of adults without impairments. Furthermore, compared to adults in higher-income households, people who live below the federal poverty level report mental discomfort at a rate that is 70% greater. (Cree et al., 2020).

#### Objectives

The objective of this project is to provide one-on-one financial monitoring and assistance to a Bridgewell resident to help them achieve financial independence ultimately reducing the need for financial support over time.

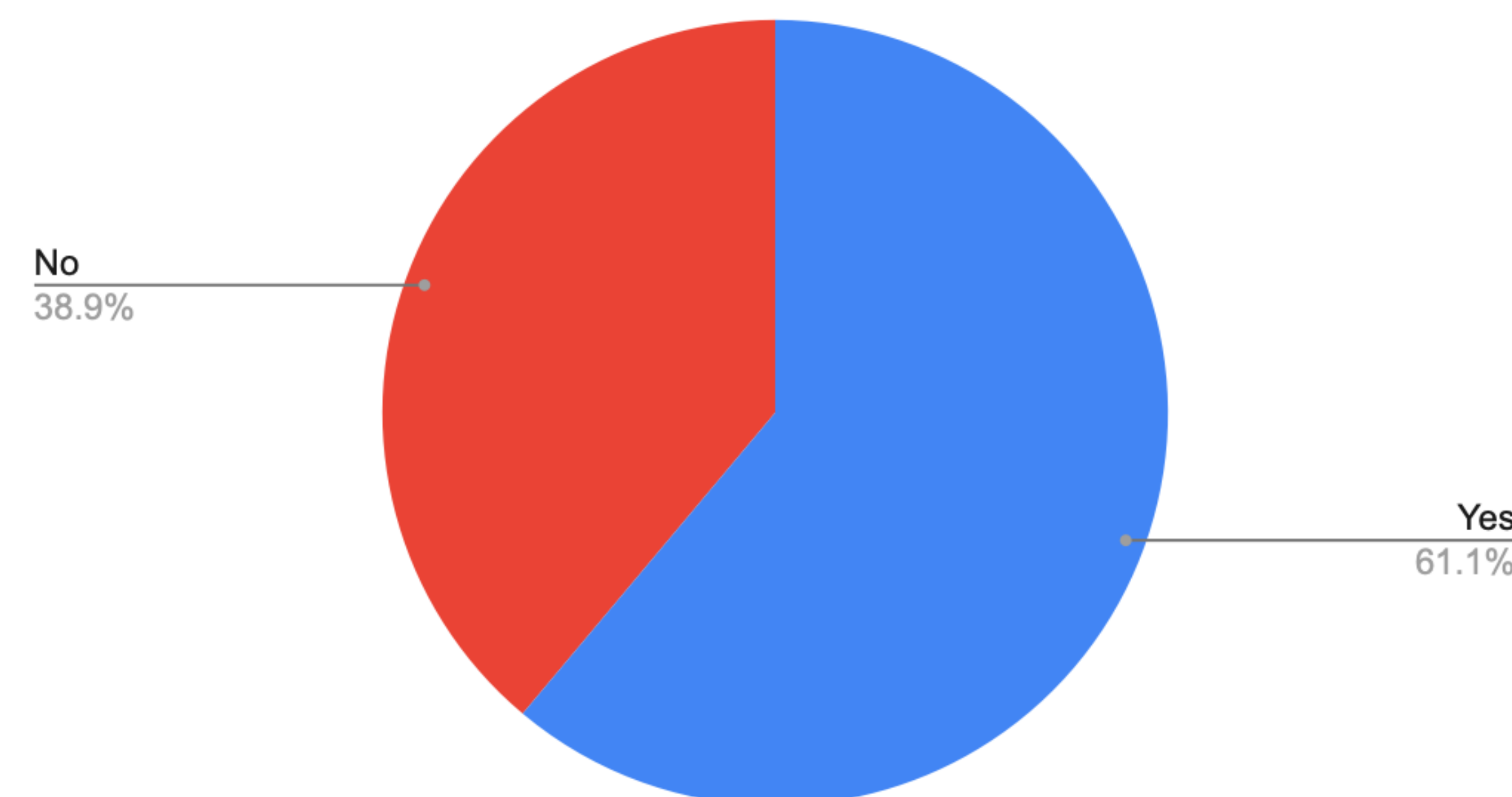
#### Methodology

Bridgewell eHana is a human services management and electronic health record system that acts as a central hub for residents' health records. It is intended to simplify and consolidate several facets of healthcare and support services, facilitating the management of vital data pertaining to the health and welfare of its inhabitants and clients. Using this database, the following tasks have been executed and monitored on a weekly basis:

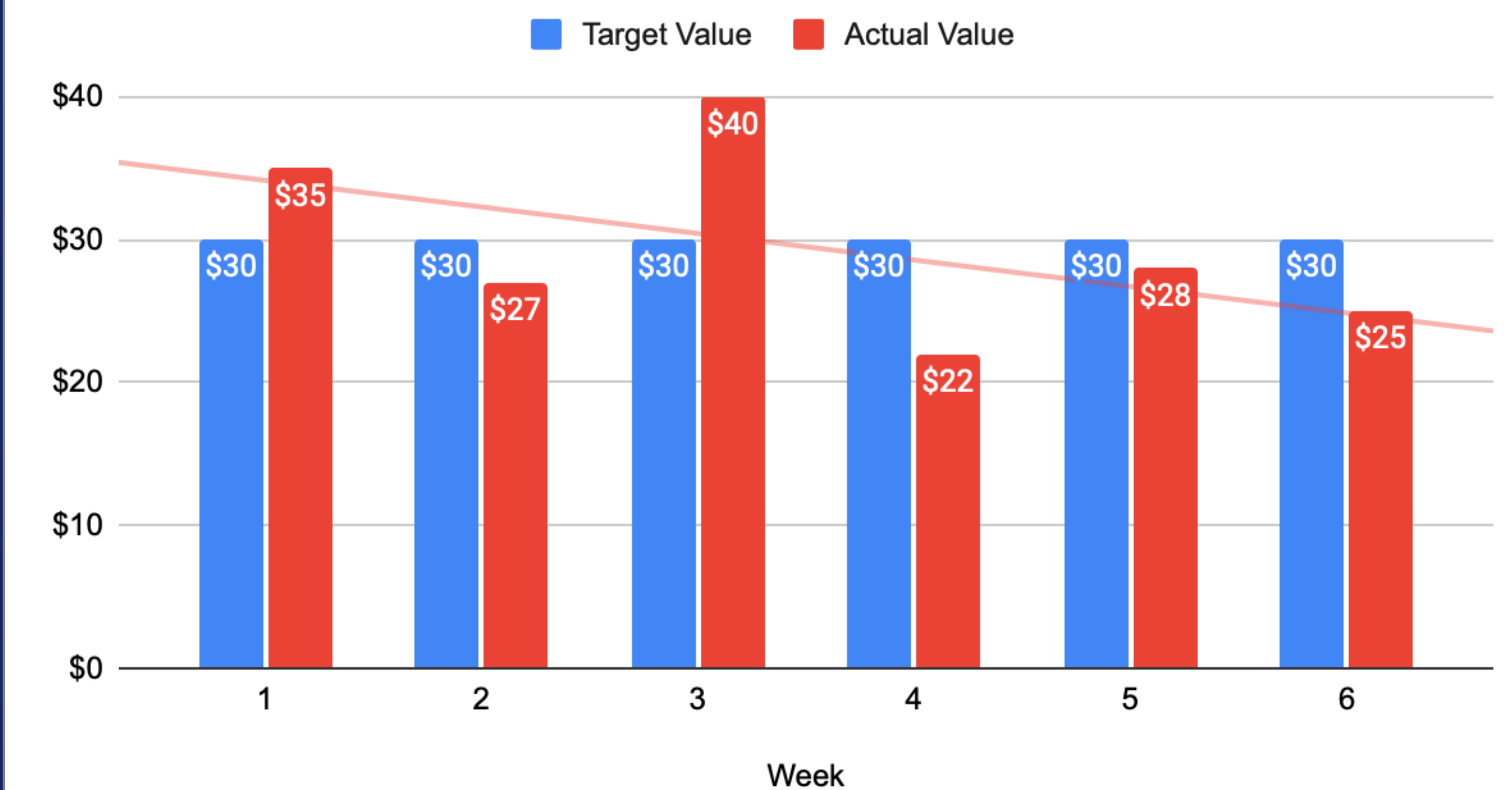
- Meeting with the resident to assess their financial situation.
- Developing a personalized monthly budget.
- Creating a financial worksheet to track expenses.
- Educating the resident on financial literacy and effective budgeting.
- Regularly monitoring receipts and transactions.
- Assisting the resident with practicing debit card usage.
- Scanning and uploading financial transaction records to the eHana system.
- Providing feedback and guidance based on financial data.

#### Results

##### Success of Independent Transactional Purchases



#### Weekly Budget Tracker



#### Conclusions

- Out of 18 transactional purchases, 11 transactions were successfully completed independently and 7 transactions needed additional assistance; therefore not being successful.
- Overall, there was 66% success rate in reaching their target goal. Out of the recorded 6 weeks, 4 weeks met/were under budget and 2 weeks were over budget.

#### References

- Friedman, C. (2022). Financial hardship experienced by people with disabilities during the COVID-19 pandemic. *Disabil Health J.*, 15(4), 101359. doi:10.1016/j.dhjo.2022.101359
- Cree, R. A., Okoro, C. A., Zack, M. M., & Carbone, E. (2020). Frequent mental distress among adults, by disability status, disability type, and selected characteristics - United States, 2018. *MMWR*, 69(36), 1238–1243. doi: [10.15585/mmwr.mm6936a2](https://doi.org/10.15585/mmwr.mm6936a2)

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