

# VDC Office Hour Session Two: Tips and Tools to Monitor Monthly Veteran Spending – Monthly Service Reports

August 4, 2021 2:00 – 3:00 PM EST

## Key Takeaways

- ✓ **Participants engaged in meaningful discussion as well as question and answer in the VDC Office Hour Session, Tips and Tools to Monitor Monthly Veteran Spending, to encourage partnerships across the VDC Network!**

Over 150 individuals, representing ADNAs and VAMCs, attended to hear tips on monitoring monthly Veteran spending using Monthly Service Reports and heard from the Delta Center for Independent Living and St. Louis VAMC on their VDC program's best practices for monitoring monthly Veteran spending.

- ✓ **A helpful tip for monitoring monthly Veteran Spending includes using the VDC Monthly Services Report Template to document actual Veteran spending.**

The Monthly Services Report Template contains the following components to assist with tracking: 1) Invoice Tracker – provides a high-level view of the Veteran's actual spending each month; 2) Calendar Tabs – the Template includes tabs for 12 calendar months, with an optional 13th month if services were rendered over 365 days spanning 13 months, and 3) Space for the VDC provider to input the Veteran's identifying information, average monthly budget, monthly admin fee, and services/goods the Veteran purchases monthly.

- ✓ **The in-person person-centered counseling assessment is essential for administering a comprehensive review of resources and supports.**

A useful tip for managing Veteran spending is to work with the Veteran to establish a VDC spending plan that maximizes usage of their available budget and clearly defines the schedule and delivery of goods and services. Then, it will be much simpler to support the Veteran with monitoring use of the budget with the Monthly Service Report.

- ✓ **Practical takeaways and actionable next steps were reported by participants!**

Participants said that they would:

- ✓ Adopt the new Monthly Service Report Template or rework existing Monthly Service Reports to align with processes for tracking monthly Veteran spending;
- ✓ Work with the FMS to ensure Monthly Service Reports are accurate and develop plan to share resource and review with Veterans;
- ✓ Include caregivers' schedules in the VDC Spending Plan and Monthly Service Report;
- ✓ Join the 3<sup>rd</sup> VDC Office Hour Session, focused on managing VDC invoices and supporting timely billing;
- ✓ Continue the discussion on the VDC TA Community; and
- ✓ Email the [VDC Technical Assistance Team](#) with any questions.