

## Sample — Confidentiality Policy TEAM Institute

The E-MDT is composed of professionals from various disciplines whose primary focus is to investigate, intervene, and prevent financial exploitation of older adults. Taking the time initially to think through all of the issues identified in this guide will increase the chances of a successful program implementation.

### The following agencies are represented on the Livingston County E-MDT:

- Karen Webber, Forensic Accountant
- Livingston County District Attorney's Office
- Legal Assistance of Western New York
- Livingston County Office for the Aging
- Lifespan's Elder Abuse Prevention Program
- Livingston County Sheriff's Office
- Livingston County Adult Protective Services
- University of Rochester Medical Center

The E-MDT does not replace an agency's involvement in a case but is an added support to help address financial exploitation cases.

### Why bring a case to the E-MDT?

- Assistance from the E-MDT Coordinator to provide suggestions or referrals even if a case is not yet ready to be brought to the team;
- Access to numerous professionals at one time to consult on a case and provide recommendations; and
- Unique access to a forensic accountant and geriatric psychiatrist. Convene a study team or task force

### A case may be eligible for review by the E-MDT if:

1. The victim is age 60 or over;
2. There are detectable signs of possible financial exploitation present; and
3. The victim has at least one of the following characteristics (1) health or mental health problems and/or physical impairments; (2) possible cognitive impairment and/or dementia; (3) social isolation and/or inadequate social support.

### Contact the E-MDT Coordinator with any questions or to discuss a case:

Lifespan E-MDT Coordinator Allison Campbell  
(585) 244-8400 ext. 140  
[acampbell@lifespan-roch.org](mailto:acampbell@lifespan-roch.org)

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