

The Right Door for Hope, Recovery and Wellness

Chapter Title Fiscal Resources	Chapter # F		Subject # 259.1
Subject Title Representative Payee	Adopted 03/15/05	Last Revised 4/10/17	Reviewed 6/6/06; 6/30/10; 2/23/11; 2/24/14; 4/10/17

PROCEDURE

Application

This procedure shall apply to The Right Door for Hope, Recovery and Wellness.

1.0 Intent

A representative payee receives and manages funds for a person who cannot manage his or her own funds. The payee’s main responsibility is to use the funds to pay for the consumer’s immediate and foreseeable needs and to save any remaining funds for the consumer.

- 1.1 The Right Door for Hope, Recovery and Wellness shall designate a staff member to manage payee accounts for consumers.
- 1.2 The consumer shall have reasonable access to the funds, subject to his or her budget/spending plan, and as long as their basic needs have been met. Funds in representative payee accounts shall remain the property of the consumer at all times.

2.0 Budget/Spending Plan

The support coordinator assigned to the individual shall be required to meet regularly with the consumer to establish a budget/spending plan and review it with the consumer.

- 2.1 If a guardian with financial authority has been appointed for the consumer, he or she shall approve any budget/spending plan before it is implemented.
- 2.2 A current copy of the spending plan shall be on file in The Right Door for Hope, Recovery and Wellness Fiscal Department for verification to pay any bills.

3.0 Duties

Required duties include, but are not limited to, the following:

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- Determine the consumer's needs, use his or her funds to meet those needs, and save any remaining balance for the consumer.
- All funds are kept in a segregated general ledger account with earned interest, if applicable, appropriated to the consumers account.
- All accounts are reconciled monthly, records kept of all funds received and spent, and made available for the consumer's review.
- Complete and submit reports to applicable agencies (e.g., Social Security Administration) and report any changes affecting social security benefits to the Social Security Administration.
- Return any ineligible benefits to the appropriate agency.

Robert S. Lathers, Chief Executive Officer	Date		