

The following descriptions were pulled from CFPD's proposals to BHI, describing the additional functions of the BHI MH Rep Payee (vs. our traditional Rep Payee position.) Please read both the RP job description and these additional services to get the full scope of this job.

Service Provision: Using our current Rep Payee program's best practices as a foundation, we'll customize program elements based on the express needs of this group and their Transition Team. Please see the attached Rep Payee Coordinator Job Description for more detail. Routine services include:

- Performing an initial intake with the client and his/her representatives by phone, in person or Skype
 - o Learn about the client's present and past financial concerns; his/her experiences with money handling; goals for saving and spending; who to include or exclude from communications about the client (support network)
 - o Develop a budget with the client based on known income and expenses
 - o Identify areas where client could be saving money by changing services; help identify services the client currently lacks and make referrals
 - o Review policies and procedures; gain agreement from client and RP
 - o Provide instructions on how to have all bills transferred to our mailing address and give us authorization to discuss accounts
 - o Present program options offered by CFPD for no-contract cell phone plans; using reloadable grocery cards; using Walmart or other gift cards to manage spending
 - o (Beginning mid-2015) Determine whether the client could benefit from using a debit card vs. handling paper checks
- Paying all regularly-scheduled bills that have been provided to the RP in a timely and accurate fashion including rent, food, utilities, medical costs and other ongoing expenses
- Handling new or emergent requests for special or one-time payments
- Communicating with Social Security to address any changes in income or benefits
- Alerting Social Security of any changes as required (e.g., a change in residence, admission to hospital, incarceration, etc.)
- Monitoring account balance to assure compliance with income and resource limits
- Sending annual accountings to client and to SSA; providing accountings as-needed for entry into new programs, eligibility redetermination, etc.
- Documenting interactions with clients and their myriad service providers
- Making reports to Adult Protective Services (APS) and other monitoring agencies if it seems the client is at risk of financial abuse (or any type of abuse we're made aware of); advising clients of their rights and referring to legal assistance when needed
- Advocating for clients whose income or bills are incorrect
- Negotiating payment plans with creditors/collection agencies
- Alerting appropriate people/authorities when clients' capacity to make financial decisions is in serious question; providing referrals regarding powers of attorney or court-ordered decision-making

Specialized Services for CCTS clients would add:

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- Becoming the Authorized Rep for SSA benefits Connecting people eligible for benefits but not yet receiving them to agencies practicing the SOAR model of SSA application completion.
- Working one-on-one with clients to change billing address, authorization info (vs. having them do this on their own)
- Setting up regular communication with Transition Specialists to learn about clients' evolving needs during intensive services
- Setting up regular "meeting" time with CCTS-referred clients to address concerns, answer questions, make changes to budget/spending as needed (by phone or, preferably, via Skype)
- Directly assisting clients in completing eligibility documentation for income-based programs; communicating with those programs as needed
- Providing written reports to Transition Specialists as needed to document the clients' performance in the program; assisting individuals to move to greater or lesser levels of financial oversight, as appropriate
- Potentially accepting referrals to our Conservatorship program when it is determined that the client is not able to manage funds within their own benefit, and meets a legal standard for court-ordered financial decision-making
- Charging no fee directly to the client; program funding will cover this cost