



Policies and Procedures

- 1) Checks will be mailed out or funds deposited to your personal account as per budget agreement. It is up to the client to budget weekly spending amounts. Requesting 'extra' money is not an emergency.
 **No checks are processed and mailed out on the same day they are requested, and no checks are available for pick up by the client.
- 2) If a need arises, the payee will complete the request within two days, unless it is an emergency. Emergency is defined as: death, rent deposit, lack of food. Other exceptions will be decided at the discretion of the payee as they arise.
- 3) It is the beneficiary's responsibility to provide income information to the Rep Payee in a timely manner. The Rep Payee is required to report all employment income to the Social Security Administration.
- 4) Questions and/or concerns can be directed to the Rep Payee during the hours of 8am-4pm Monday through Friday; response time will generally be within 1 to 2 business days.
- 5) Large purchases or additional bills require a new budget which means cutting spending money or other expenditures already in the budget.
- 6) Bills are paid in this priority:
 - Rent
 - Food
 - Utilities
 - Medical
 - Insurance
 - Loans/Credit Cards
 - Telephone
 - Cable
 - Spending Money
 - Other
- 7) The Representative Payee is responsible for completion and submission of representative payee reports. Other government or social service agencies that need financial information (i.e. Housing, Food Stamps, Medical Assistance), can be directed to this office for income information. All other information will be the responsibility of the beneficiary.
- 8) Rent changes must be given to the Rep Payee before the 1st of every month. If given on the same day or after, there will have to be a rent change on the following month.
- 9) All bills must be sent directly to the Rep Payee. The beneficiary is responsible to make necessary address changes since vendors will not talk to anyone other than the person whose name is on the account.
- 10) Requests for amounts over \$100 require a detailed receipt for Social Security purposes.

We always strive to provide our services in the best interest of our clients. As Rep Payee, we must follow SSA guidelines and rules and therefore make decisions accordingly.



Policy and Procedure Sign-Off Sheet

By signing this, I, _____ confirm that I have received Northwest Washington Payee Services' policies and procedures. I also attest that I have read them completely and thoroughly, understand them to the fullest extent, and agree to abide by the guidelines they establish. If at any time I am unclear about a policy or have a question I will consult my Rep Payee for further guidance.

Client Signature

Date

Witness Signature

Date

Parent/Guardian/Representative Signature

Date

Witness Signature

Date