

REPRESENTATIVE PAYEE CLIENT AGREEMENT

Supplemental Security Income (SSI) is a needs-based benefit. That means the amount of money for which you are eligible is based on three things:

1. Your living arrangements
2. Other income/benefits you may receive
3. Your total resources, which are things you own. For example; bank accounts, cash on hand, stocks, bonds, homes, vehicles, etc.

Fiscal Assistance, Inc. (FA) will not be held responsible for any overpayments due to your failure to notify our office of changes.

IT IS VERY IMPORTANT TO NOTIFY US IMMEDIATELY IF ANY OF THE ITEMS BELOW OCCUR.

Residence:

- You move from your residence
- Someone permanently moves into or out of your residence
- You enter jail or prison (FA does not accept collect phone calls from jail or prison)
- You change your phone number
- You enter or leave a hospital or skilled nursing facility.
- You leave the state of Wisconsin.

Note: If you fail to notify us by phone, email, or mail and money is issued for rent, utilities and other expenses, FA is not responsible for any overpayment that occurs.

Resources:

- The amount of alimony or child support you receive changes
- You inherit or are given money
- You open or close a bank account, and if you receive interest on the account
- The amount of any benefit checks you receive directly changes
- You receive money from another source (VA, Railroad Retirement, or pension)
- Your benefit from another source stops
- You start or stop working

Note: If you work, you must provide copies of your wage stubs to FA to submit to the Social Security Administration. If you do not provide copies of your wage stubs and are overpaid, FA will not be held responsible.

- Purchase a burial plot or make burial arrangements
- Purchase a life insurance policy on yourself or someone else
- Buy or sell any auto, truck, boat, motorcycle, RV, etc.
- Buy or sell any real estate, including a house, condo or mobile home

WHAT HAPPENS DURING THE INTAKE INTERVIEW AT FA?

1. If you are a new claimant, you must contact Social Security to apply for benefits prior to Fiscal Assistance applying to be your representative payee.
2. At the time of intake, FA will tell you when we expect to begin receiving your benefits.
 - If the intake is completed before the Social Security Administration's "cut off" date for the month (this is usually the second Friday of each month) FA should receive your next month's benefits.
 - If your benefits are in suspense (your benefits are stopped for some reason), FA will assist you to help get your benefits reinstated as quickly as possible.
3. You will be told who your Rep Payee is and you will be provided with their contact information. The Rep Payee is the person you will speak with regarding your budget and account. You will need to notify your Rep Payee in the event any changes occur; such as moving, living arrangements, and phone number, etc.
4. Your Rep Payee has an extension number and voicemail box for you to contact them. Your Rep Payee will return your voicemail as soon as possible. It is important to leave full details on your voicemail message. Always leave your first and last name, the phone number where you can be reached, and detailed reason for your call. PLEASE LEAVE ONLY ONE MESSAGE PER DAY AND ALLOW THE REP PAYEE TIME TO RETURN YOUR CALL. Leaving multiple messages will only delay your return call.
5. Your budget will be established at the time of the intake. If we are unable to establish a budget at the time of your intake, you will need to contact your Rep Payee to do so before FA can release any funds. You will need to provide a copy of your rental agreement and bills that you would like FA to pay before payment can be made.
6. FA will need to receive all of your income to help pay your monthly expenses. If all of your expenses can be met without a portion of your income, you may be allowed to keep that income. If this is the case, your personal spending allowance will be decreased accordingly. This will be discussed with your Rep Payee during intake.

WHAT HAPPENS AFTER I SIGN UP FOR FA REP PAYEE SERVICES?

1. If you need to speak to your Rep Payee, call (608) 846-7058 or toll-free: (855) 201-4230 and enter their extension.
2. You must have an appointment to meet with your Rep Payee. You can schedule an appointment by calling your Rep Payee. Same day appointments will not be scheduled.

3. Once your budget is set for the month, you must follow the spending plan that is in place for that month. Any requests to change your budget for the following month must be submitted at least 5 days before the last business day of the current month.
4. Personal and Incidental funds are included in your monthly budget. If you have additional funds available after your budgeted expenses are set, you may request to have a portion of those funds issued to you.
5. You must notify your Rep Payee of any spending requests by noon on the day prior to their bill paying day. For example, if your Rep Payee processes their bills on Tuesday, you must contact them by noon on Monday.
6. You are required to submit receipts to show how the funds outside of your set budget are spent.
7. You can receive your personal spending money via check mailed to your address, deposited to your bank account or deposited on your debit card offered by FA through WEX Rapid! Card. Rent and vendor checks are to be made out to the vendor and mailed directly to them.
8. Checks are mailed the day before their scheduled arrival. For example, if you are scheduled to receive a check on Friday, that check will be mailed Thursday afternoon. FA is not responsible for any postal service delays.
9. You should have your utility bills mailed directly to FA for payment. Your name must be on the bill.
10. If you are homeless and do not have a mailing address, we encourage you to obtain a post office box. If you do not have a mailing address, we will recommend that you use the WEX Rapid! Card to receive and use your personal spending/food money.
11. For your protection, you are the only person that can pick up your check. Vendor checks will not be released to clients. Vendor checks are mailed to the address FA has on file for that vendor.
12. FA observes all Federal holidays. If you are scheduled to receive a check on a holiday or a weekend, you should receive your check the day before that holiday.

I understand the above statements and I also understand the following:

1. If FA mails a check to you for whatever reason and you don't receive it on the expected date, FA requires you to wait 5 business days before it will be reissued. A stop payment will be issued at that time and then a check will be reissued.
2. IT IS VERY IMPORTANT TO NOTIFY YOUR REP PAYEE BEFORE THE LAST DAY OF THE MONTH IF YOU ARE PLANNING ON MOVING THE FOLLOWING MONTH. IF YOU FAIL TO DO SO, YOUR RENT MIGHT NOT BE PAID CORRECTLY AND YOUR PERSONAL SPENDING CHECK MAY BE MAILED TO THE INCORRECT ADDRESS.

3. You are expected to be a good neighbor and responsible member of your community. We reserve the right to terminate payee services if we receive complaints that you've damaged property, are verbally or physically abusive to neighbors or other members of the community, or appear to be chronically intoxicated or under the influence of drugs in public. Any funds remaining in your account will be returned to the Social Security Administration.
4. FA is here to serve you and administer your benefits according to the Social Security Administration regulations. FA will terminate payee services if a client is physically or verbally abusive to FA staff or other clients or damages FA property. Any funds remaining in your account will be returned to the Social Security Administration. FA reserves the right to withhold a check or deposit from any client who appears to be intoxicated or under the influence of drugs. This policy is for our client's own protection.

I hereby acknowledge that I understand FA's Client Agreement and received a copy for my records. I agree to abide by the reporting and procedure requirements to maintain my payee service with FA.

Client Signature

Date

FA Staff Member

Date