Client Handbook

Representative Payee Program

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Phone Hours:
Monday thru Friday: 9 am – 6 pm

Welcome to the (CLASS) Representative Payee Program!

Our mission is to provide financial guidance and community based support resources to persons of any national origins, race, sex, and/or physical/behavior/developmental disability. CLASS understands that financial guidance is one of the many tasks that can affect and improve overall quality of life. CLASS provides consumers a pathway that leads to successful community inclusion, sustainable support resources and access to services that will promote wellness and healthy living. CLASS provides support services to consumers that are in need of a helping hand. CLASS clients will be offered access to quality of life opportunities and daily options that will provide then with a sense of relief and confidence with the management and overall allocation of their daily living expenses. CLASS will always respect our client's rights and dignity while promoting education and advocacy on behalf of the clients we serve.

Our goal is to make sure your living expenses are paid, and that you have funds throughout each month to take care of your personal needs.

CLASS was established in 2015, CLASS is a non-profit agency providing budgeting and financial management assistance to disabled, homeless, and elderly persons in the Cuyahoga, Lake, Summit, Geauga County Area.

CLASS operates in a manner consistent with the guidelines of entitlement providers and is approved as an Organizational Representative Payee by the Social Security Administration.

Getting Started

- Documents needed from client
- Photo ID
- Apartment Lease/Rental Agreement
- Release of information
- Contract for service
- All current and past bills in order to discuss a budget.
- Counselor will be assigned to each participant
- Discuss monthly bills and weekly budget

C.L.A.S.S. Provide participants with the tools needed to move toward financial independence

During your first budget, meeting a **CLASS Counselor** will ask you questions regarding your current housing, bills and other debts. We will also ask you to sign a Release of Information so we may talk to your utility companies, and other vendors we need to pay on your behalf. If you have someone you would like us to talk to about your finances, we can add their name(s) to the release during your meeting.

CLASS Responsibilities

To determine the client's current needs for day-to-day living (housing, food, and clothing) and use his or her benefits to meet those needs.

Keep written records and receipts for rent, utilities, and major purchases made for the beneficiary, to support how the funds were spent and/or saved on the client's behalf.

Report any changes that might affect the client's payments or eligibility such as wage changes or changes in living arrangements.

Return any funds to Social Security if **C.L.A.S.S.** stops serving as the payee.

Complete payee and disability reports.

Client's Responsibilities

Change billing address for all bills in need of monthly payment. All bills need to be sent to:

Community Living Assistance Support Service

PO Box 28018

Cleveland, Ohio 44128

Any bills that are not being sent directly to us cannot be paid in a timely manner. Make sure all bills are mailed to us by contacting each company.

Turn on/off utilities if required.

Provide all receipts.

If circumstances arise which change the budget, credit card, medical bill, or any other expense, you must contact your **C.L.A.S.S. Counselor** immediately to revise the budget.

If a client moves from their current residence, C.L.A.S.S. needs a copy of the written 30-day notice that is provided to the property owner. If the notice is not on file with C.L.A.S.S., C.L.A.S.S. cannot stop rent payments, until verification from the property owner is provided.

Client is Responsible for Reporting:

- Change of address
- Change in household membership or income
- Change of marital status including marriage/divorce or widowed
- Hospitalization or incarceration for over one month
- Employment – pay stubs must be submitted to **CLASS**

MONTHLY BUDGETS

Budgets will be established after a CLASS Counselor has been given the information requested above. The CLASS Counselor will then review your monthly income and set you up with a budget. This will allow us to pay your bills and schedule funds for your groceries and living expenses.

Your budget is based on your monthly benefit amount and begin on the fifth (5th) of the month and go through the fourth (4th) of the next month. This will allow time to verify benefit's received prior to distribution of monthly funds.

*Please note, all rent checks are sent by the third (*3th*) of the month.*

HOW TO RECEIVE BENEFITS FROM CLASS

You will *NOT* receive a check in the full amount of your benefits. However, you will receive monthly/weekly/biweekly disbursement to take care of personal needs and daily living expenses. We are required to pay your rent, utilities, and bills first.

If you choose to have receive monthly/weekly/biweekly disbursement via check, we are able to mail them to your residential address.

The other option is to be provided a debit card for funds to be uploaded monthly/weekly/biweekly.

Please think carefully about your preference because we are not able to make changes in whether your funds/checks are mailed or uploaded until the beginning of the next month (request must be in writing).

PAYEE FEES

The services at the **C.L.A.S.S. Payee Financial Program** are not free. We charge $42.00 per month.

BUDGET MEETINGS

It is our goal to obtain all of the needed information for your budget during the first meeting with the **C.L.A.S.S. Counselor**. If you find the budget is not working for you, feel free to call and talk to one of our staff members. Please explain your concerns to the staff member and it will be determined if you need to schedule another budget meeting. Budget meetings typically occur once a year unless significant changes have occurred regarding to the amount of your bills or income.

If you have a case manager, the case manager is required to be present at all budget meetings. In order to schedule the budget meeting we will contact your case manager for availability, determine a day, time, and contact you to see if that will work for you also.

Please call to set up a budget meeting.

REQUESTING INFORMATION/DOCUMENTATION

If you are in need of providing information to an agency (copies of award letter, bank statements, utility bills, etc.) Please contact a CLASS. We need to know the name of the agency, their fax number, the name of the person it needs to go to and what documents are needed. We will provide this information to the agency within three (3) business days of request by faxing it directly to them.

If you are in need of copies of your utility bills for PIPP or HEAP applications, please contact staff and we will have the information ready at the office for you to pick-up within two (2) business days.

SPECIAL REQUESTS

We understand that you are an individual and your needs and wants are different from every other client. You may request additional funds to be disbursed.

These requests must be submitted to your budget counselor in writing by Monday at 5 pm, and you must receive confirmation in order for processing.

If you have, enough funds left in your account a check can be mailed or funds will be uploaded to your debit card.

We are required to provide documentation to the Social Security Administration for all disbursed funds. If you are interested in making a large purchase (over $300), you may be required to ask for an invoice from the store in which you would like to make the purchase (please have them include tax).

We may be required to make the check out directly to the store. If a check for a large payment can be made out to you, you will be required to bring in the receipt from your purchase.

Clients must provide receipts for all special requests over $300.

In the event clients **do not** provide receipts for special requests over $300, future special requests may be denied.

LOST OR MISPLACED DEBIT CARD

Each client will be given a temporary 53rd debit card during after the first meeting. Within the next 7-10 days, clients will then receive a personalized debit card with their first and last name engraved.

Should a client lose or misplace their assigned debit card, a new card will be sent to the client via USPS mail. New debit cards will arrive in 7-10 business days.

ALCOHOL OR OTHER DRUGS

In some cases, clients are suspected or known to have alcohol or other drug abuse issues. In these situations, we will be more inclined to set up more frequent distributions to the clients in smaller amounts, in comparison to larger distributions less frequently. If you have a history of alcohol and drug abuses, Class may reserve the right to charge up to $79.00 per Social Security Administartion.

Thank you, we look forward to working with you!

I, ____

have reviewed and understand my responsibilities, and will comply with all rules and regulations according to the C.L.A.S.S. Payee Client Handbook.

Client Signature: ____________________________ Date: ____________

CLASS Rep Signature: _________________________ Date: _____________

Case Manager Signature: ____________________ Date: ______________

Agency: ____