HOW TO APPLY FOR PAYEE SERVICE

□ Complete the Client Application and return the completed application via fax or email.
Attach, if available: □ Client's Photo ID □ Client's Social Security Card

□ Attach additional supporting documents, if available:
- □ Letter from Physician/Caseworker stating need for payee
- □ Guardianship forms

□ After we receive and process your application will schedule an intake meeting by phone or in person. During this meeting, we will complete any additional paperwork, answer any questions, and explain the representative payee process.

□ We will send the application to SSA to begin SSA Approval Process: SSA approval typically takes three months.

□ We will setup a Budget Planning Meeting when the application is approved by the SSA. Together, we will organize bills and expenses and create a monthly budget, including setting a weekly spending money amount.

□ Once we are named Payee we will setup an individual beneficiary account where your funds will be deposited.

□ Any bills to be paid by the representative payee must be sent to our mailing address in the client's name. Clients and support staff should update mailing addresses on all bills as soon as the payee change is approved.

□ This is a fee-based service, the monthly payment amount is set by Social Security and will be automatically deducted from the client's account

Need help completing the application?
Send what you can—we can assist in person, over the phone, or at your agency's location.

Please see our Policies & Procedures for more details. If you have any questions we are here to help!

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