

Volunteer Job Description

Representative Payee

Purpose Manage the finances of a client who is unable to do so in his/her own best interest due to disability.

Specific Duties

(Further details will be provided.)

- Register with the Social Security Administration to obtain authorization to receive Social Security or SSDI (disability) checks on behalf of the consumer.
- Open a bank account for direct deposit of beneficiary's checks at Commonwealth One FCU.
- Receive and pay bills for the client using his/her funds.
- Send the client checks to cash for personal spending money, and, if requested, send checks for appropriate special purchases.
- Keep a record of bank transactions, purchases and other spending using the Income and Expense Worksheet provided by the Social Security Administration.
- Provide an accounting of transactions including supporting documents such as receipts and bill stubs if requested by Social Security or the CSB.
- Maintain contact with the client's case manager. You may also be notified to attend a redetermination interview with the case manager at Social Security. These interviews determine consumer eligibility to continue receiving benefits, and are generally conducted annually. This interview takes approximately 45 minutes.
- Report to the Social Security Administration any changes that affect the client's entitlement to receive checks (i.e. death of the client, long-term hospitalization of the client, or if you will no longer be rep payee).
- Read the Social Security booklet, *A Guide for Representative Payees*.

On average, clients have three bills per month. Examples include bills for rent and medical expenses. In addition, payees send spending money to the client weekly or bi-weekly.

Training and Requirements

- Read the Confidentiality Policy in this Volunteer Handbook.
- If you choose to have direct contact with the client, additional training is required.

Time Commitment

Approximately two hours per month per account managed. Payees may manage multiple accounts. The first month will require additional hours to set up the account at the Social Security Administration and the bank.

Contact Person

For more information, call 703-746-3484.